Putting AI and Automation to Work in Contact Center Operations

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"The 2023 US Contact Center Decision-Makers' Guide (15th edition)"

BUILD SMART SELF-SERVICE CHATBOTS FASTER WITH ENLIGHTEN XO

SOUNDS NICE

81% of customers say they prefer self-service but have frustrating interactions with unintelligent customer service bots. And companies are struggling to build smart bots due to complexity and cost.

Not exactly a win-win scenario. NICE CXone can help.

Enlighten XO is an AI-and data-driven solution that elevates basic bots to truly intelligent virtual agents (IVA) auto-engineered for the best containment and CX possible. How?

1. **IDENTIFY** — Mining data from human conversations
2. **ENSURE** — Truly understand conversation paths and intents
3. **AUTOMATE** — Accelerate deployment of valid automation opportunities

Boost customer containment and satisfaction while saving time and money with Enlighten XO. That's NICE.

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About NICE

With NICE, it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud-native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center – and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

About CXone

NICE CXone is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center – and beyond. Imagine the possibilities when your customers are effortlessly guided to quickly resolve their needs directly on your digital properties or matched with a well-prepared agent—every time and on every channel. Plus, with predictive analytics and embedded artificial intelligence (AI), your team can resolve issues faster, personalize each experience – and forge deeper loyalty with each customer.

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ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING

Artificial intelligence (AI) is a wide-ranging term for technology solutions which appears to emulate human cognitive capabilities through the 'understanding' of complex, natural language requirements, in order to reach its own conclusions and develop itself based on what works and what doesn't. Machine learning refers to the ability of software to evolve based on measuring its performance and success, without input from humans.

Within the customer contact space, there is a great deal of interest in how AI can work to deliver a superior customer experience at every hour of the day, across channels, leveraging the vast amounts of data that are available to many large organizations. Supported by the speed and availability of affordable processing power, and the enormous amount of structured and unstructured data available, the opportunity exists for AI to take customer contact far beyond what is feasible now.

Although we are at the beginning of the AI revolution, there are already numerous well-known examples widely used by the public, including Amazon's Alexa and Apple's Siri. These virtual assistants 'understand' unstructured natural language requests and deliver the solutions in a manner similar to a live personal assistant.

As AI can be given access to all of the relevant data a company holds on its customers, as well as unstructured data held elsewhere (for example, forums or social media channels), it has a far wider source of knowledge from which to draw, compared to human agents. In theory, an AI with sufficient sophistication could make human agents all but unnecessary, but for the foreseeable future, AI will usually work alongside its human colleagues.

The usage of the term 'AI' in the contact center covers an enormous area, and is often used by solution providers, media and businesses to refer to functionality that may only very tenuously be said to be linked to true AI, which is itself a wide-ranging term for technology solutions which appear to emulate human cognitive capabilities through the 'understanding' of complex, natural language requirements, in order to reach its own conclusions and improve itself.

Rather than arguing about semantics, the umbrella term of AI will be used descriptively rather than prescriptively within this chapter. Its use within the contact center will be linked to three broad types of linked functionality – the "4 A's of AI" – analysis, anticipation, augmentation and automation.

Analysis:

Whereas for humans, enormous, fast-changing datasets make understanding and action more difficult, AI requires extremely large sets of data in order to find patterns and work optimally. Tools such as speech-to-text and optical character recognition (OCR) enable the AI to normalize data and compare like with like, and machine learning allows systems to improve accuracy and the effectiveness of outcomes without constant input and tweaking from human users.

Anticipation:

Based upon the customer's history, the context of the interaction, and the factors influencing successful outcome of similar interactions in the past, AI will be able to predict the best action to take. This may be in the form of an answer taken from the knowledge base, the correct prioritization and routing of a call, or the prompting of an agent to ask a specific question or make a relevant sales offer.

Augmentation:

The AI is able to gather relevant information from numerous sources in real-time in order to provide enhanced information to human agents or the self-service system, increasing the likelihood of a successful outcome. The AI is also tasked with updating relevant systems and initiating the correct business processes.

Automation:

In circumstances where there is a high level of confidence that the solution presented by the AI is correct, human intervention may be circumvented altogether. The AI system may monitor the interaction in real-time, using sentiment analysis to determine whether there is a need for a live agent to collaborate.

There are numerous use cases for AI and machine learning in the contact center, and they are listed in greater detail in ContactBabel's report, "The Inner Circle Guide to AI, Chatbots & Machine Learning", including:

Improve Voice Self-Service

Using AI-enabled natural language recognition can alleviate the high level of self-service abandonment associated with speech recognition and DTMF IVR, as there is no fixed menu to navigate and no limit to the number of options a customer has to explain their issue. The onus is placed upon the system to understand the customer's intent, rather than forcing the customer to shoehorn their request into a format allowed by the predefined rules and format of the business.

Improve Web Self-Service

For most businesses, the customer is given free rein to search through documents, pre-written answers and archives, hoping to stumble across the right answer for themselves. The often proves time-consuming and ultimately frustrating for the customer, who will then go elsewhere or call the contact center in a negative mindset. An AI guide would be a valuable aid in improving CX and deflecting unnecessary calls.

Assisted Service

The use of AI to assist agents in real time within a call offers the chance of a real paradigm change: by the nature of the job, an agent-customer interaction has always necessarily been between two people, and the level of support that an agent can actually receive within a call is very limited. AI can work alongside agents to provide relevant knowledge that may be otherwise take a long time to find, and update the knowledge bases available to humans and AI self-service systems using an automated feedback loop that is constantly improving based on actual outcomes.

Improve Digital Channel Experience and Decrease Cost

Perhaps the currently most popular use of AI in the customer contact environment is in handling digital enquiries, where web chats generally take far longer than phone calls (due to agent multitasking, and typing time) and some email response rates can still be measured in days.

As the cost of web chat is broadly similar to other channels such as email, voice and social media, there is room for increasing efficiencies and lowering costs. Digital channels may work well for customers, but businesses are not generally seeing the cost savings that automation can bring. Very few emails or web chats are handled entirely by AI, although a growing proportion of web chats are dealt with by AIs working alongside agents, suggesting responses which agents can then accept or amend. This way of working is most likely to be the norm in the foreseeable future, with the speed of automation and the emotional intelligence of humans combining to provide superior service at a lower cost.

Real-time Analytics and Support

AI can be trained to understand intent and recognize patterns through immersion in vast quantities of historical data, so that when a call is taking place, it can draw upon this knowledge and provide advice or action that has proven successful previously, moving towards the actual provision of real-time analytics.

AI assists in real-time speech analytics through applying the results of machine learning that have been carried out on large quantities of previously recorded conversations, providing:

- agents with the understanding of where their conversational behavior is falling outside of acceptable and previously successful norms (such as speaking to quickly or slowly, or in a monotonous fashion)
- an assessment of the meaning of non-verbal cues such as intonation, stress patterns, pauses, fluctuations in volume, pitch, timing and tone in order to support sentiment analysis
- understanding the actions and information that have been seen to provide successful outcomes in previous similar interactions, and relaying this to the agent within the call.

Augmenting RPA

Robotic process automation (RPA) consists of digital software agents that handle repetitive, rules-based tasks at high speed, with great consistency and accuracy. The RPA workforce acts in the same way as human agents, working at the presentation layer level rather than requiring deep integration with systems, replicating the work that live agents or chatbots would be doing, but more quickly and without requiring any rest. RPA agents can input data, trigger processes, pass work onto other robots or humans as rules dictate and replicate data across multiple applications without making any copying mistakes.

AI can work in association with other process automation solutions (which may in themselves not fall under the category of AI). For example, in the case of unstructured data such as customer emails or letters, optical character recognition can assist the entry of the customer requirements into the business system. Using natural language understanding, AI is able to discern the intent of the inquiry, using a knowledge base and assessing the previous best responses to similar enquiries in order to provide an agent with a recommended solution. It is very likely that the agent will be given the option to add or amend this response before sending to a customer. Any feedback from the customer can be assimilated in order to gauge success and fine tune future responses.

Improving the Customer Journey

AI can be applied across the entire customer journey, including sales, marketing and service, helping organizations understand customer behavior, intent and anticipating their next action. For example, an AI solution may find a pattern amongst previous customers that they are likely to search for specific information at a particular point in their presales journey, and proactively provide this information (or an incentive) to the customer before they have even asked for it. AI can also help with customer onboarding through predicting which customers are likely to require specific assistance.

Machine learning will allow AI to go beyond simply what they have been programmed to do, seeking out new opportunities and delivering service beyond what has simply been asked of them. Through understanding multiple historical customer journeys, AIs will be able to predict the next most-likely action of a customer in a particular situation, and proactively engage with them so as to avoid an unnecessary inbound interaction, providing a higher level of customer experience and reducing cost to serve.

Improving Routing Strategies and Outcomes

AI can be applied to IVR interactions, asking a series of questions to customers using natural language processing to understand their intent. Depending on the customer requirements, it may be possible to answer the query without using a live agent, or in those cases where agents are needed, the prioritization and routing of the call can be optimized, decreasing call transfer rates and increasing first contact resolution. Over time, routing strategies will move away from being rules-based and towards cognition, which will also feed forecasting and scheduling processes.

Predictive behavioral routing uses insights gathered from historical calls and the analysis of customer communication types in order to choose the agent whose skills and characteristics are most likely to achieve a positive response from the next caller in the queue. Predictive behavioral routing uses millions of algorithms to decode the language used by agents and customers, in order to understand sentiment, personality type, preferred method of communication, emotional intelligence and transactional attributes (such as ability to overcome objections and willingness to sell.

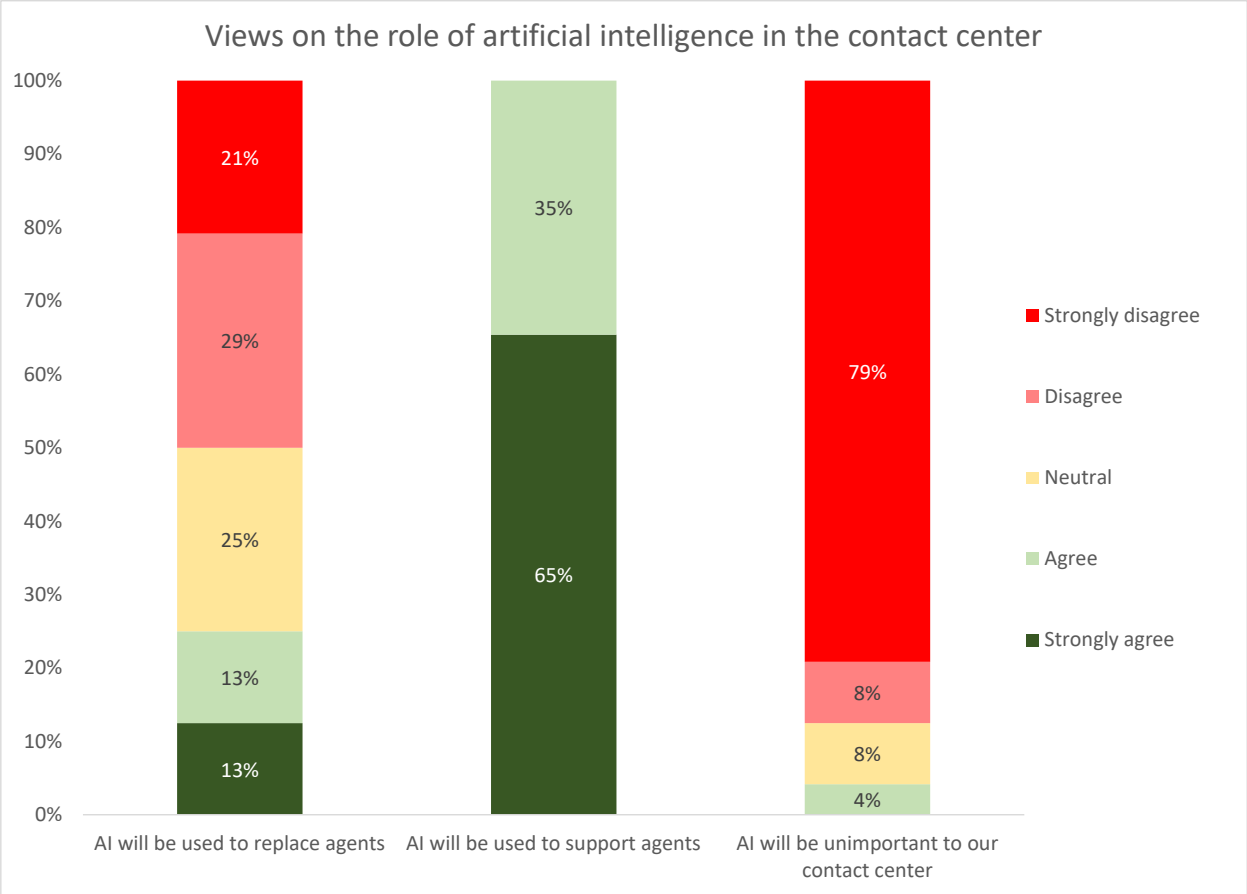
Each customer can be allocated a specific personality style, and when calling again, are routed through to an agent whose performance when interacting with this specific personality type has generally positive results.

Survey respondents were conflicted in the views as to whether AI would replace agents, with 26% agreeing or strongly agreeing that this would be the case, and 50% disagreeing to some extent. Respondents from large 200+ seat contact centers were more likely to feel that AI would replace human agents, with those in small and medium operations tending to believe that this would not be the case. There is a general movement over time towards disagreeing that AI will replace agents.

Unanimity was found when the question was asked as to whether AI would support human agents, with all respondents either agreeing or strongly agreeing. In the foreseeable future, it seems the most likely outcome: reducing risk, speeding up responses and providing customers with higher quality resolutions are all beneficial to both customer and business.

79% strongly disagreed that AI would be irrelevant to their contact center (the highest on record): only a few respondents from the smallest operations were likely to say that AI would not impact their operations at all.

Figure 1: Views on the role of artificial intelligence in the contact center

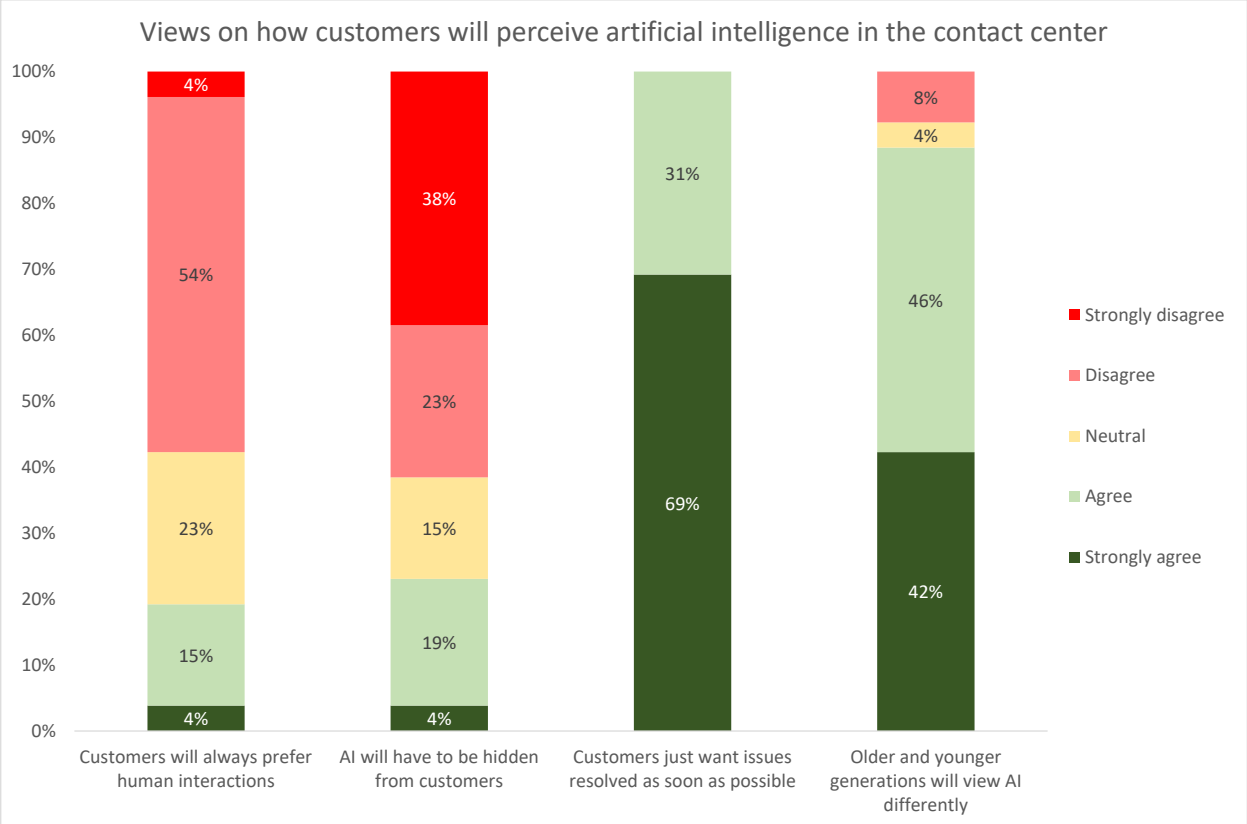


There is a widespread belief that customers will not have a problem with AI if it helps them to resolve their issue as quickly and easily as possible. The uptake in web self-service suggests that customers will accept non-human assistance if it is most convenient for them, although there was something of a disagreement between small and large operations: the former were more likely to think that customers would prefer human interactions, whereas those in large contact centers felt that customers would not be too concerned about being served by AI.

There was general agreement that older generations will take more persuasion to be happy with AI compared to a younger generation that is already used to dealing with AI in their everyday life (e.g. through smartphones or other virtual assistants in the home).

There was also a general feeling that AI would not need to be hidden from customers.

Figure 2: Views on how customers will perceive artificial intelligence in the contact center



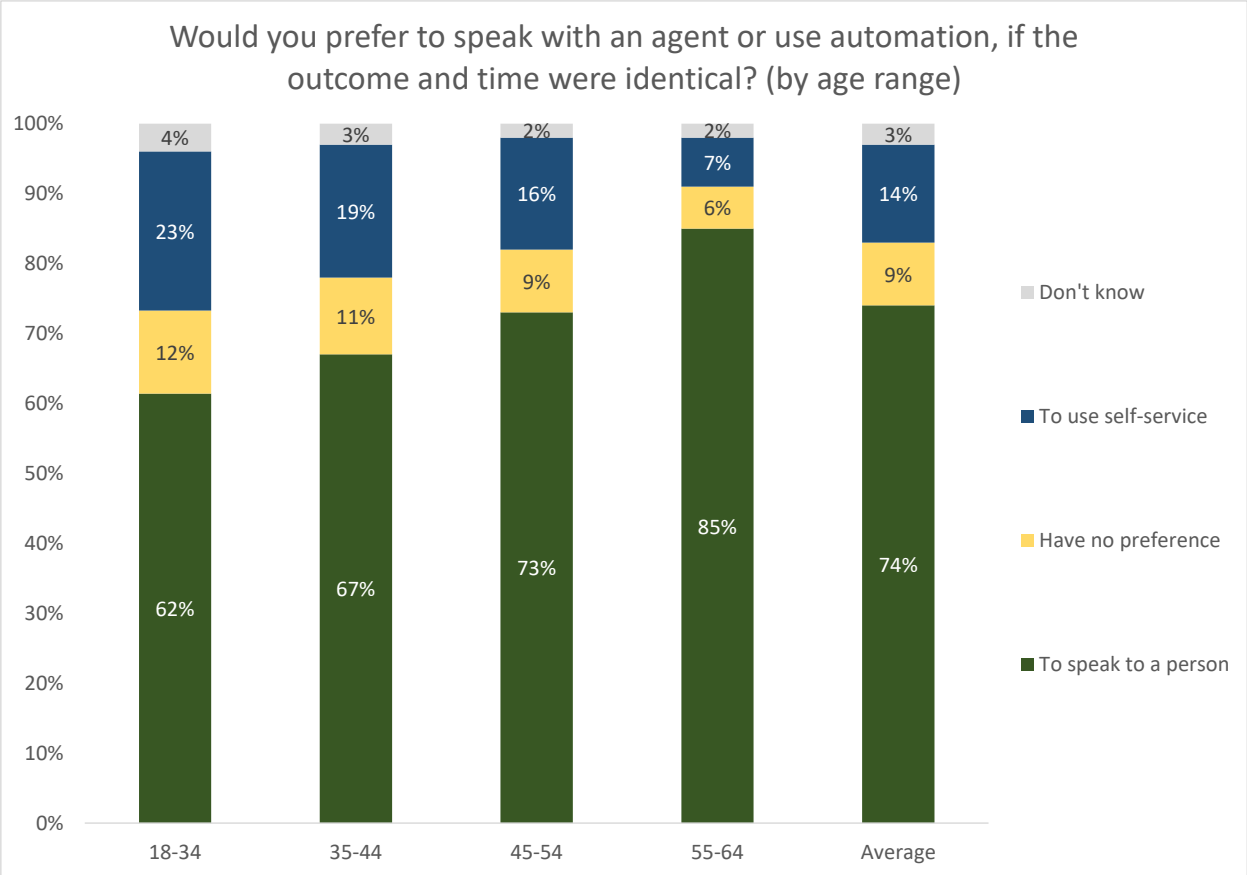
In order to gauge the level of acceptance and expectation around fully-automated customer contact, US consumers were asked whether automation or human assistance would be preferable to the customer base in circumstances where the customer effort, time and outcome were exactly the same. Bearing in mind the rapid advance and uptake in digital channels, the findings were quite surprising, as it was found that the customer base is currently strongly in favor of speaking to a human employee.

In order to gauge the level of acceptance and expectation around fully-automated customer contact, 1,000 US consumers were asked whether automation or human assistance would be preferable to the customer base if the customer effort, time and outcome were **exactly** the same. Bearing in mind the rapid advance and uptake in digital channels, the findings were quite surprising.

Looking at the age group of the customer base, older demographics feel more strongly about human contact, with younger and middle-aged customers are more likely than them to choose to use automation. This fits in with findings that the younger section of the customer base places more value on their time, whereas the older demographic prefers to have their issue resolved first-time by a single employee.

Bearing in mind that this question emphasized that the outcome and customer effort/time **would be identical** in each case, the results show that the customer base at present is not yet at a stage where automation is generally seen as being even on equal terms with human contact, let alone the preferred method of contact with a business, and that the human touch is still very much valued.

Figure 3: Would you prefer to speak with an agent or use automation, if the outcome and time were identical? (by age range)



Women were a little more likely than men to want to speak with an agent (76% vs 73%). More affluent households ($100k+) chose automation in 19% of cases vs. 12% for sub-$50k households, and there was a similar pattern for college graduates (18%) vs high school graduates / non-graduates (12%).

Perhaps the most obvious potential use of AI in the customer contact environment is in handling digital enquiries, where the following charts show that web chats generally take far longer than phone calls (due to agent multitasking, and typing time) and that some email response rates can still be measured in days.

The most sophisticated chatbots or virtual agents encourage the visitor to engage with them using natural language, rather than keywords. The virtual agent will parse, analyze and search for the answer which is deemed to be most suitable, returning this to the customer instantly. Many virtual agent applications will allow customers to give all sorts of information in any order, and either work with what it has been given, or ask the user for more detail about what they actually meant. Having been unconsciously trained over the years to provide their queries in a way which standard search functionality is more likely to be able to handle (for example, a couple of quite specific keywords), customers must be encouraged and educated to use natural language queries in order for virtual agents to be able to deliver to their full potential.

Building intelligent self-service faster with AI and conversational data

By Tamsin Dollin, Director, Product Marketing, NICE CXone

When customers need service or support, most start with some form of digital like a Google search or a website. In fact, 81%[1] of consumers say they prefer self-service.

The problem that customers run into is when they encounter search results that don't apply, a site that lacks critical information, or a "basic bot" that fails to answer even simple FAQs. Some scripted bots are so bad, they feel robotic and frustrate the customer rather than resolve their issues.

Customers aren't the only ones struggling. So are businesses. Reliable, intelligent chatbots are complex so they're a headache to develop. They take time to perfect, and the cost is substantial.

In the meantime, customers are pulling out their hair and picking up the phone to call agents. Not a win-win situation. Don't customers and businesses deserve better? NICE thinks so.

Rather than businesses having to guess how to create the best self-service experiences, NICE has done it for them. We take an AI- and data-driven approach that elevates basic bots to truly intelligent virtual agents (IVA). Meet Enlighten eXperience Optimization (XO), from NICE CXone, the only solution of its kind.

Enlighten XO is engineered to help businesses improve self-service CX by identifying the best automation opportunities, creating new use cases, and training AI bots faster than ever before. They're auto-engineered for the best customer containment and CX possible.

How?

First, Enlighten XO mines conversational data derived from actual human conversations to identify optimal opportunities for automation. Then, it determines the utterances and conversation paths necessary to ensure customer "intents" are understood so it can deliver a better self-service experience. Next, XO accelerates deployment by automating the training and creation of the self-service bot.

This saves businesses significant time and effort by eliminating manual development and hand coding—the most costly and onerous part—which shrinks "time to deploy" from months to just days. Companies can create more effective virtual agents capable of full resolution because they have been trained on real human conversations.

Unlike typical hand-scripted bots with limited recognition and accuracy, AI-engineered self-service results in high success rates and reduces significant volume handled by human agents. In turn, this creates new opportunities for sales, service, and support roles to offload repetitive tasks and instead focus on higher-value projects with more rewarding work.

Truly intelligent virtual agents ensure that customers are understood, and the self-service experience flows. The result is higher success rates (aka "containment") and reduced volume handled by human agents. Not to mention a dramatically improved automated experience for customers.

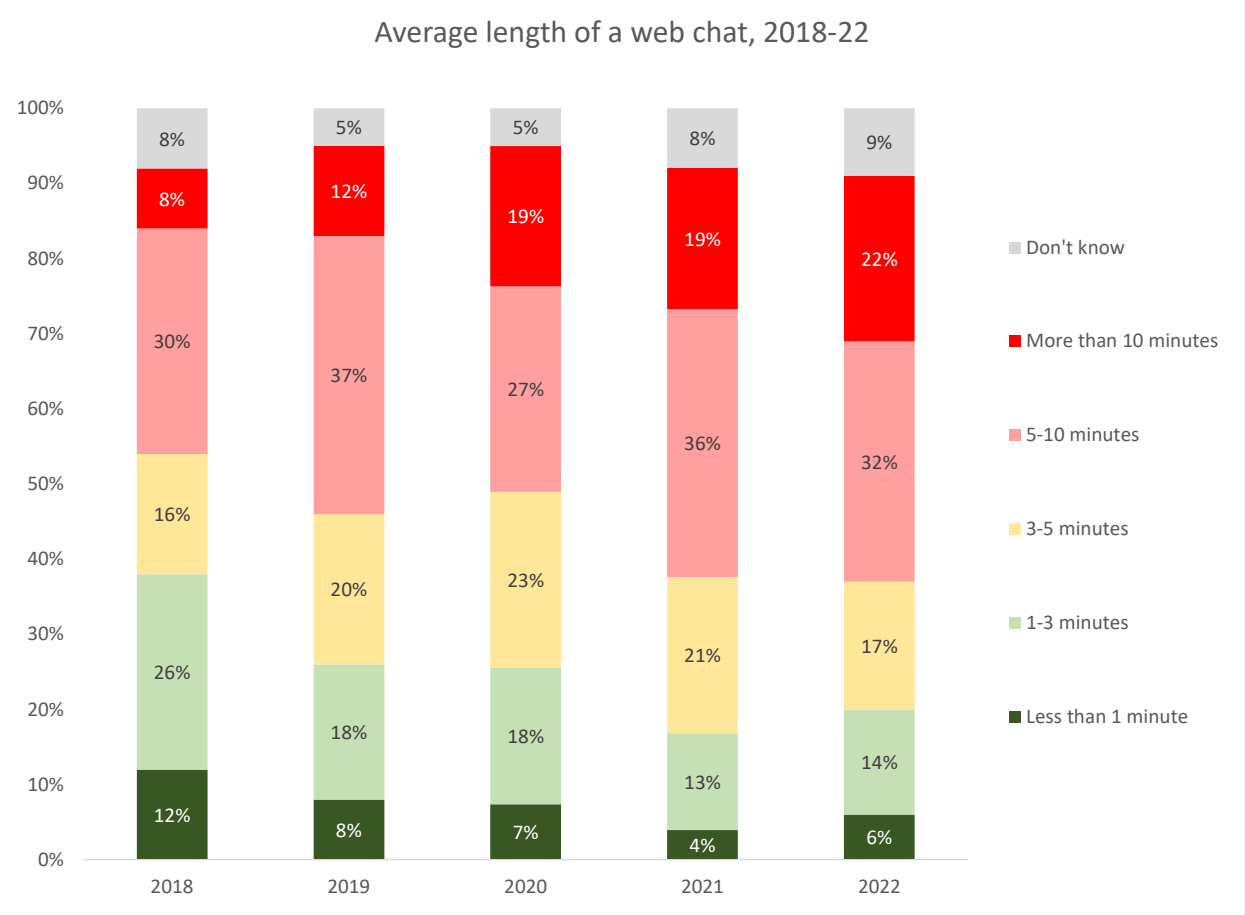
Everyone wins.

Learn how Enlighten XO can transform your self-service today!

[1] "Digital First CX Research Report." Nice.com, 2022

There is something of a rise being seen in the average length of a web chat, as they become more complex and are seen by customers as a genuine alternative to a phone call. This view is supported by the rise in the average cost of a web chat, implying that each interaction is taking longer and costing more. This provides fertile ground for AI to handle many of the simpler web chat requests, freeing up chat agents to focus upon more complex customer issues.

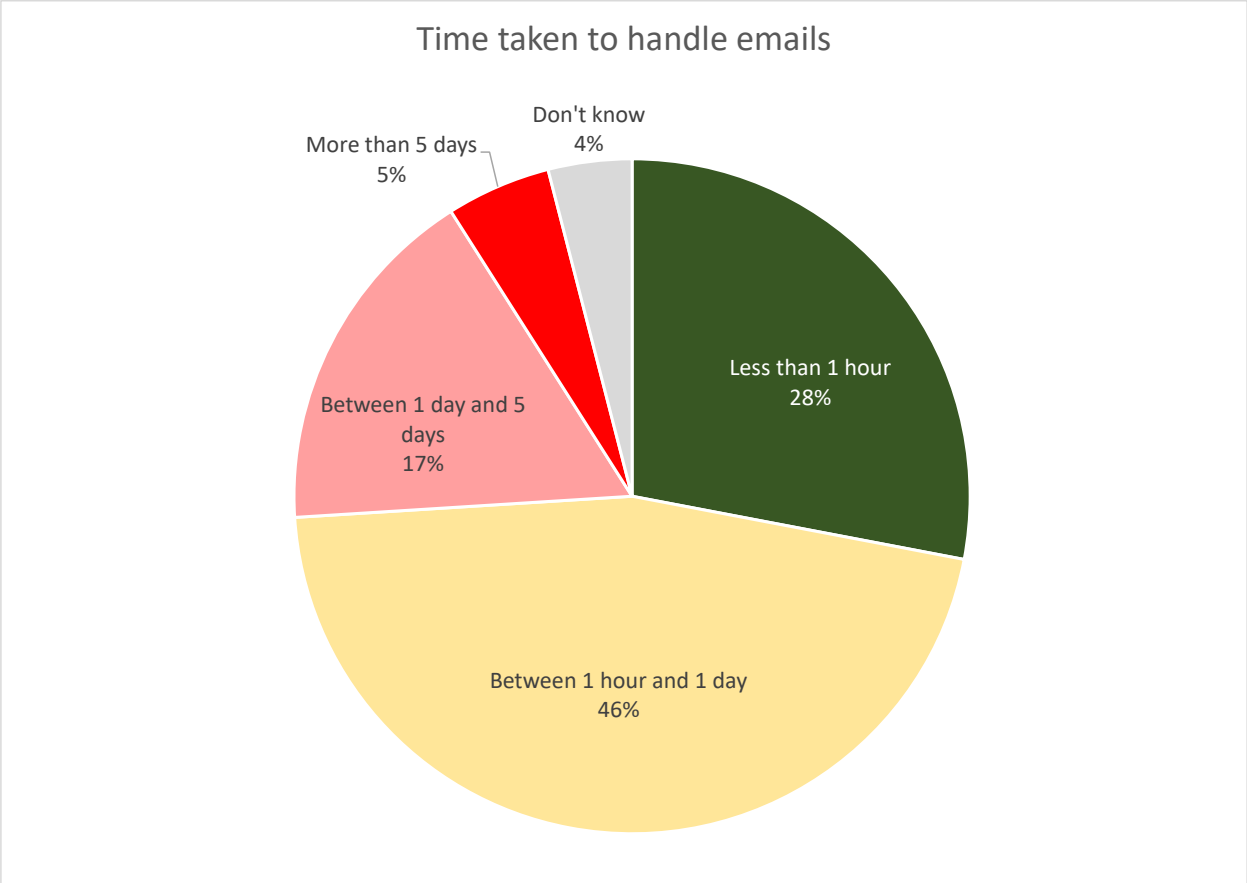
Figure 4: Average length of a web chat, 2018-22



AI can also be used for email to create responses that look as though they have been written by a person rather than a machine, using natural language processing to write content, as well as understand it. Emails can be tailored based on the customer's history and behavior, optimizing marketing messages as well as service, sending emails at a time when they have been calculated that they are most likely to be opened.

Personalized emails can be produced by AI, based on subscribers' past email browsing activities to understand the type of content that they actually care about. This is a way in which AI can outperform human agents, who do not have the opportunity or capability to find patterns or draw conclusions from huge amounts of data.

Figure 5: Time taken to handle emails

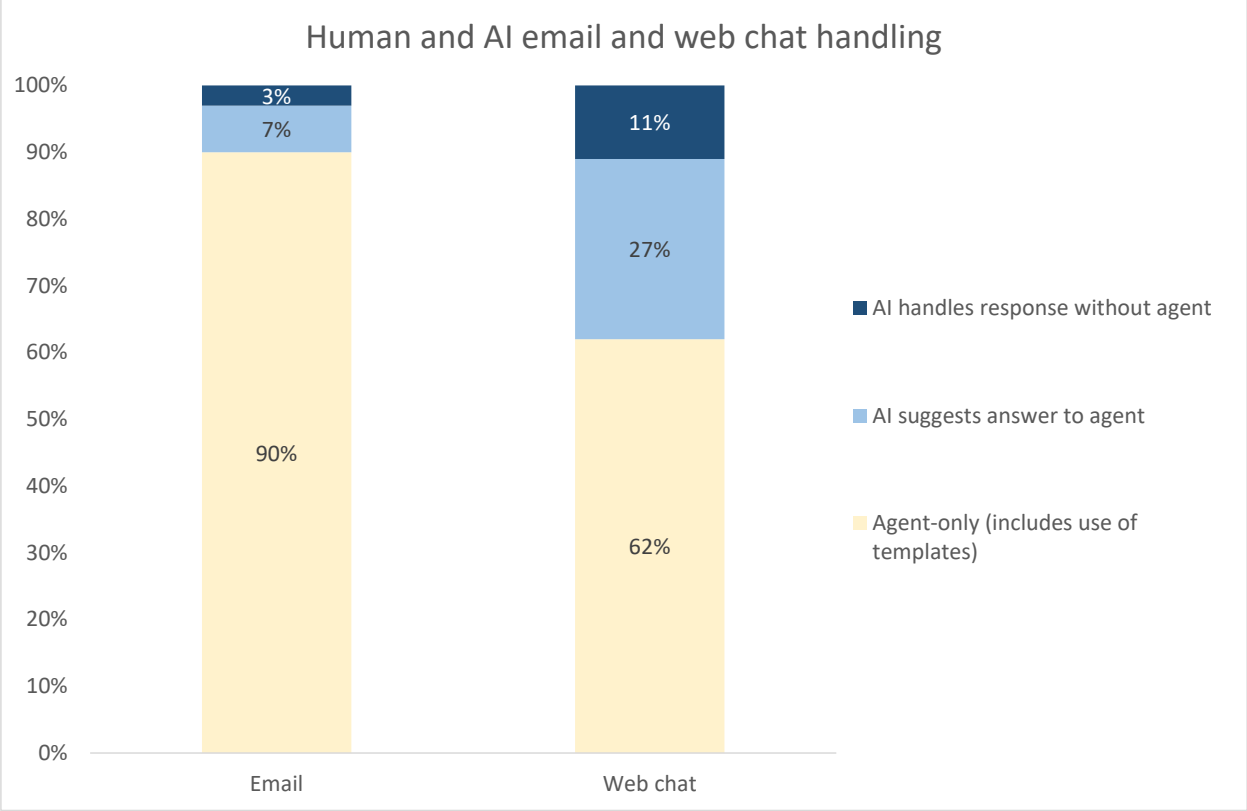


One reason for the slow response rate and growing length of web chats and emails is that there has been little automation used in the US contact center industry, which also means that the cost of an email or web chat has historically been very similar to that of a phone call.

Digital channels may work quite well for customers, but businesses have not yet generally seen the cost savings that automation can bring. Very few emails are handled entirely by AI, although a growing proportion of web chats are dealt with by AIs working alongside agents, suggesting responses which agents can then accept or amend, and 2022 has seen another rise in fully-automated web chat responses.

The hybrid agent/AI way of working is likely to be the norm in the near future, with the speed of automation and the emotional intelligence of humans combining to provide superior service at a lower cost.

Figure 6: Human and AI email and web chat handling



The Virtual Agent or chatbot may appear to a browsing website visitor to be a human agent, offering web chat. However, it is an automated piece of software which looks at keywords and attempts to answer the customer's request based on these, including sending relevant links, directing them to the correct part of the website or accessing the correct part of the knowledge base. If the virtual agent cannot answer the request successfully, it may then seamlessly route the interaction to a live web chat agent who will take over. It is possible that the browser will not even realize that any switch has been made between automated and live agent, particularly if the web chat application is sophisticated enough to pass the context and the history to the agent, although as seen previously, many businesses believe it is best practice to identify clearly between virtual and real agents.

Sophisticated AI applications attempt to look for the actual intent behind the customer's question, trying to deliver a single correct answer (or at least a relatively small number of possible answers), rather than a list of dozens of potential answers contained in documents which may happen to contain some of the keywords that the customer has used. The virtual agent application may also try to exceed its brief by providing a list of related questions and answers to the original question, as it is well known that one question can lead to another. Solution providers and users train the system to pattern-match the right words or association of words with the correct result: the application, unlike older forms of web search techniques, does not simply guess what the customer wants, or how they will express themselves. Through 'listening' to what the customers actually say – perhaps through a mixture of large quantities of audio and text – the initial set-up configuration can achieve a good accuracy rate, which really benefits over time as a positive feedback loop is established. Solutions that gather and differentiate customer requests and results from multiple channels, noting the difference between them, have an even better success rate.

Virtual agent functionality 'understands' the context of what the customer is asking, with the result being more akin to that of an empathetic human who also has had access to what the customer has been trying to do. For example, if asked "When can I expect my delivery?", the context and the required answer will be different depending on whether the customer has placed an order and is enquiring about its status, or has only a hypothetical interest in turnaround times in case they decide to place an order.

When the virtual agent application has low confidence that it has returned the correct result, it is able to escalate the customers query seamlessly to a live chat agent, who then has access to the self-service session history, enabling a greater chance of a successful resolution without repetition. (It is generally considered best practice that escalations to real agents are not hidden from customers). The eventual correct response can be fed back to the automated virtual agent (and the knowledge base underlying it), which will make it more likely that future similar requests can be handled successfully through automated agents.

CURRENT AND FUTURE USE OF AI

Despite a low current use of AI across industries, there is widespread interest in implementing this solution, with 43% of respondents that do not currently use AI intending to implement it at some point, especially in larger operations and the TMT, outsourcing and finance sectors.

Figure 7: Use of AI / Machine Learning, by vertical market

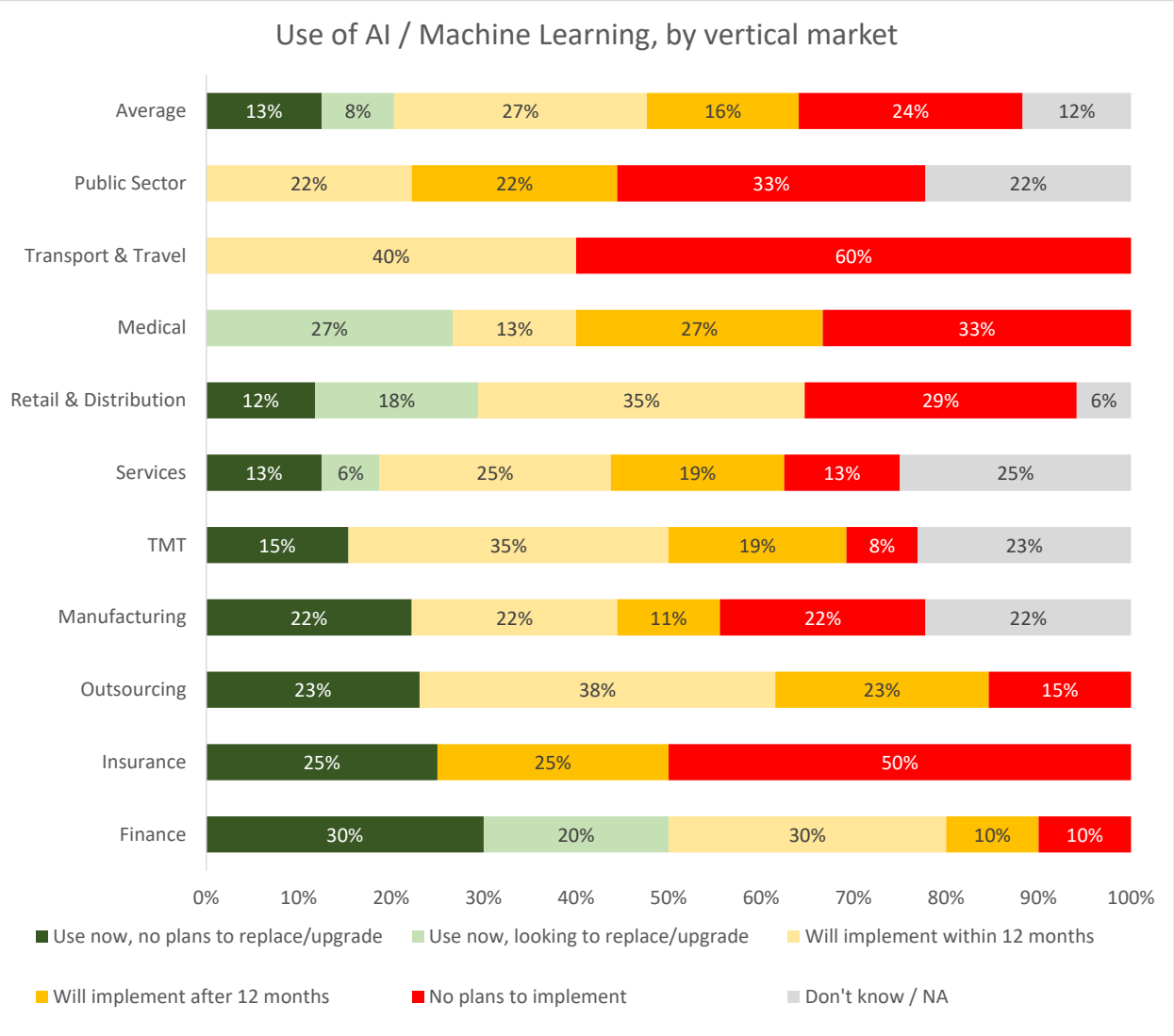
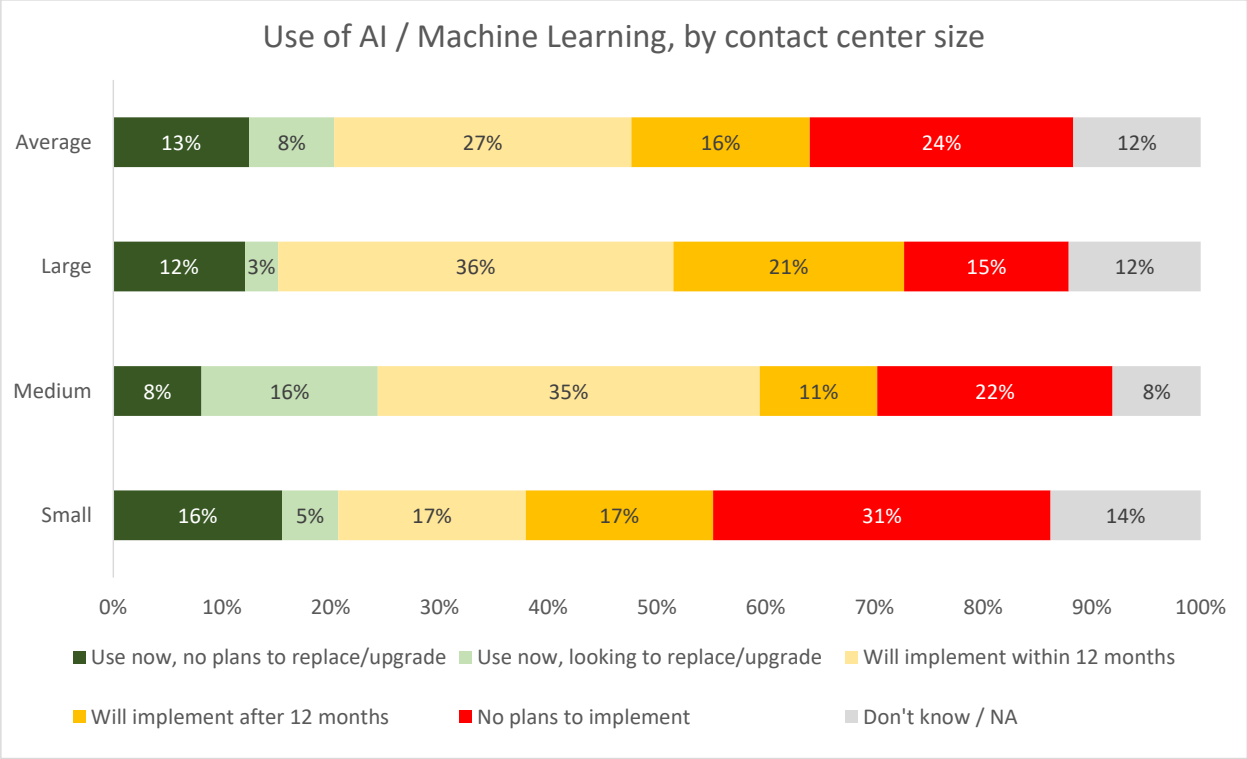


Figure 8: Use of AI / Machine Learning, by contact center size



Potential uses of AI in the customer contact space include:

- Emails that look as though they have been written by a person rather than a machine, using natural language processing to write content, as well as understand it
- Tailor information based on the customer's history and behavior for marketing as well as service, sending emails at a time when they have been calculated that they are most likely to be opened
- Increased opportunities for personalization, as the full customer history can be checked in near real-time, with far more data practically available to the AI than would be for a human agent
- Machine learning will allow AI to go beyond simply what they have been programmed to do, seeking out new opportunities and delivering service beyond what has simply been asked of them
- Use of text analytics to assess not only data held within the company, but also in unstructured, third-party environments, such as social media, comments on websites and public forums, in order to learn and deliver proactive service before it is even requested

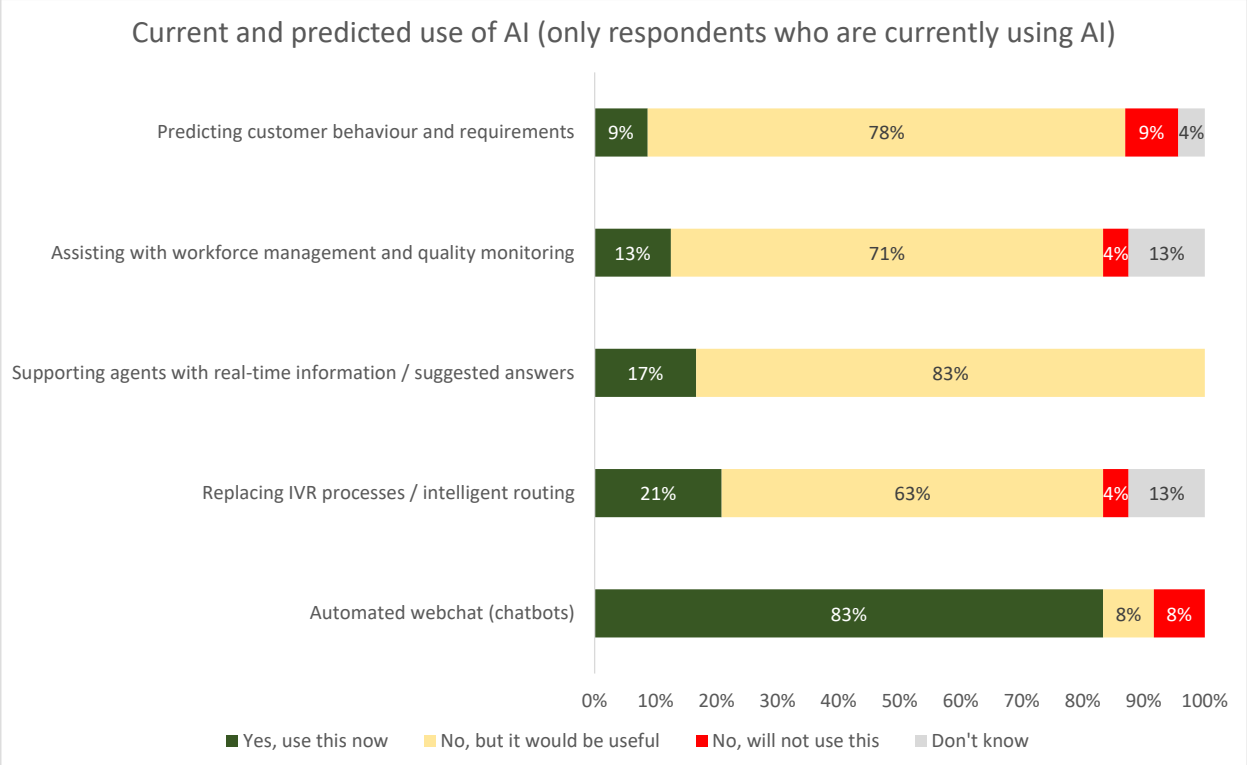
- Text analytics can also be used on inbound interactions such as emails, running an AI triage system to assess the priority and urgency of each request in order to handle these more effectively and in an appropriately timely manner

- Work alongside agents to provide relevant knowledge that may be otherwise take a long time to find, and update the knowledge bases available to humans and AI self-service systems using an automated feedback loop that is constantly improving based on actual outcomes

- Through understanding multiple customer journeys, AIs will be able to predict the next most-likely action of a customer in a particular situation, and proactively engage with them so as to avoid an unnecessary inbound interaction, providing a higher level of customer experience and reducing cost to serve.

Current use of AI is very strongly focused upon chatbots, although is interest amongst AI users to widen usage to support agents in real-time, predict customer behavior, assist with workforce management, quality and performance monitoring and to augment and improve call routing. Few respondents stated that they would not expand their use of AI to provide any of these new capabilities.

Figure 9: Current and predicted use of AI (only respondents who are currently using AI)



Businesses' interactions with customers will become a highly polarized mixture of the automated and the personalized. Moving a large proportion of interactions onto self-service works for businesses, and is increasingly popular with a customer base that is becoming more sophisticated and demanding in what it expects from self-service. AI takes this a step beyond, offering personalized service without the need for a human agent in some cases.

We can expect to see personal technology applications seeking out the best deals on offer, or interacting with a business on behalf of customers without involving the customer at all. This leads to the conclusion that many customer-agent interactions will be exceptional, such as a complaint, an urgent or complex issue or a technical query that an FAQ or customer community couldn't solve. It is also likely that whole segments of the customer base who don't want automation at all will be handled directly by live agents in many cases.

Many self-service scenarios suggest a world in which customers speak directly to 'intelligent' systems, but an e2e world is becoming more possible, in which systems talk to systems. The customer will delegate many of their business interactions to a pseudo-intelligent device, which will store information such as personal preferences, financial details and individuals' physical profiles. Customers will instruct the device to research the best deals for products and services, and to come back to the device's owner with the best selection. The personal AI would 'call' the relevant contact center (which could in fact be either a AI or possibly a live agent in some cases) and even purchase the best deal without having to involve the owner in any way. The same principle applies to customer service: using the 'Internet of things' means that, for example, utilities meters would send their own readings to suppliers on request, and a manufacturer can detect when a part on an appliance is about to fail, and organize a replacement part and engineer visit with the customer's permission.

ABOUT CONTACTBABEL

ContactBabel is the contact center industry expert. If you have a question about how the industry works, or where it's heading, the chances are we have the answer.

We help US and UK contact centers compare themselves to their closest competitors so they can understand what they are doing well, what needs to improve and how they can do this.

The coverage provided by our massive and ongoing primary research projects is matched by our experience analyzing the contact center industry. We understand how technology, people and process best fit together, and how they will work collectively in the future.

If you have a question about the contact center and CX industry, please get in touch.

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- The Inner Circle Guide to AI, Chatbots & Machine Learning
- The Inner Circle Guide to AI-Enabled Self-Service
- The Inner Circle Guide to Cloud-based Contact Center Solutions
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- The Inner Circle Guide to Omnichannel Workforce Optimization
- The Inner Circle Guide to Outbound & Call Blending
- The Inner Circle Guide to Video & Next-Generation Customer Contact
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- The European Contact Center Decision-Makers' Guide
- The UK Contact Centre Decision-Makers' Guide
- The US Contact Center Decision-Makers' Guide
- The UK Customer Experience Decision-Makers' Guide
- The US Customer Experience Decision-Makers' Guide

- UK Contact Centre Verticals: Communications; Finance; Insurance; Outsourcing; Retail & Distribution; Utilities
- US Contact Center Verticals: Communications; Finance; Healthcare; Insurance; Outsourcing; Retail & Distribution.

To download the full "2023 US Contact Center Decision-Makers' Guide" for free, please click here.