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How to Operationalize AI Workflows in the Contact Center

Making AI useful to your team's day-to-day work, while driving company-wide ROI

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When it comes to embracing AI technology in your contact center, it's easy to get caught up in the hype. **McKinsey estimates** that AI adoption has more than doubled in the past five years. Yet, adoption and successful implementation are two different things. Organizations need to double down on operationalizing AI in the contact center to realize its true value.

In other words, it's important to know how AI fits within your team's day-to-day workflow — including quality managers, business analysts, agents, supervisors, and employees beyond the contact center. Focusing on these fundamentals can help your organization gain more value and ROI from AI technology for the contact center, including conversation intelligence.

According to **Forrester**[1], "The true standouts are those that have gone beyond the basics, crafting enterprise-ready workflows that intelligently incorporate generative AI and ML. As buyers consider their options, they should prioritize vendors that not only incorporate AI and ML but also prioritize their role in augmenting human workflows, empowering frontline agents and operations staff."

The workflows that are most important to your organization will largely depend on your team's priorities, and what's most useful to the business. Let's review some of the most widely used AI-driven conversation intelligence workflows used in day-to-day contact center operations and beyond, and how they impact organizational efficiency and effectiveness.

What is an AI workflow?

Workflows help to accelerate the adoption of AI within the organization. They are the rules that govern what happens with AI's outputs. The job of a workflow is to make the underlying technology inherently useful to employees' day-to-day tasks. Think of a workflow as a practical approach to delivering business value with an underlying AI capability.

Menlo Ventures' "State of Generative AI in the Enterprise" report predicted that enterprise adoption of generative AI (which is just one of the many types of AI used today, albeit the one with the most buzz) would accelerate with the use of "powerful, context-aware, data-rich workflows." If technology fails to deliver these workflows, the productivity gains can feel limited, and teams may not achieve their optimal ROI.

On the other hand, proven technologies with built-in workflows are enterprise ready, and can accelerate the adoption and the utility of AI across not just the contact center, but other departments in the organization

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Operationalizing contact center workflows

With AI adoption, the cart is often leading the horse. Many teams focus on the AI technology in and of itself — AI for the sake of AI — instead of the outcome they wish to achieve or the value they're trying to drive for customers. Instead, it's critical to consider the problem you're trying to solve and work backward. Shape your workflows around that problem, and allow them to drive value for your chosen solution.

Many workflow-based AI solutions categorize customer interactions, so teams can gain a greater understanding of contact center performance, compliance adherence, customer sentiment and emotion, and other important indicators. For example, one category might focus on contact drivers, or the underlying reasons why customers are reaching out to your contact or customer service center. Another might focus on repeat call language, which may indicate that an issue hasn't been resolved in a timely manner, or an indication of a deeper process issue that needs to be solved.

When viewed at the trend-level — paired with dashboards, scorecards and other methods of distilling information — these categories can provide critical insights into the Voice of the Customer (VoC) and other critical contact center KPIs. A workflow makes practical use of this information, driving meaningful change both inside and outside the contact center.

Overall, contact center workflows are focused on providing agents and supervisors with feedback — both during customer interactions and post-interaction. The goal is to create a virtuous cycle, informing agents to make them more effective based on how they have done in the past, or reinforcing positive behaviors. In addition, real-time guidance and alerts can help them better handle difficult situations in the moment.

Five practical examples of contact center workflows

Here are some practical examples of contact center workflows:

Coaching: Coaching workflows aggregate insights from customer conversations, identifying which agents are most effective based on customized manual or automated scoring criteria. By deeply understanding agent and customer interactions, supervisors can identify performance trends, target behavior for guidance or reinforcement, and create a persistent culture of improvement.

Real-time agent guidance: Real-time guidance offers agents immediate suggestions on how to improve a customer conversation, while it's still in progress. Based on predetermined parameters, such as scripting compliance, customer statements or competitive mentions, real-time alerts can help agents more effectively navigate through customer interactions and deliver better outcomes. These workflows also empower agents to ask for supervisor support, such as escalations, as needed.

Quality management: By automating the entire or part of the quality assurance (QA) scoring and analysis process, teams can evaluate 100% of their customer interactions to ensure that they're compliant with industry-specific standards. These workflows help both agents and supervisors identify and improve non-compliant language or actions, driving positive change and reducing non-compliance risk.

Summarization/after-call work: Contact summarization uses AI to automatically create objective, standardized summaries that can help agents recover time previously spent doing manual summaries as part of their after-call work. Analysts and supervisors can use these summaries to inform their investigations into potential issues and improve their coaching capabilities.

Collections: In a collections setting, navigating complex customer interactions with empathy and trust is critical. Debt recovery, regulation adherence, and vulnerability compliance workflows can help agents better understand and meet customers' unique needs, while improving business outcomes.

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Leveraging workflows beyond the contact center

Customer feedback, both unsolicited and solicited, is incredibly valuable to the organization across many different departments, not just the contact center. Many teams look to leverage VoC insights to drive business transformation in departments including marketing, product development, sales, executive leadership, and more. Combined with the solicited feedback obtained from surveys and other mechanisms, unsolicited feedback from conversation intelligence systems can help provide a more holistic view of customer experience.

Unsolicited feedback is valuable because it uses what the customer says in their own words, without being asked. What do they like or not like about your business? Did they experience issues with a specific product that might indicate a warranty claim or a recall? How did they react to a specific marketing campaign or sales outreach? It's important to understand these insights, and leverage them to drive results such as improved products, services, or marketing campaigns.

Practical ways to use workflows across the business

Workflows can be customized to specific business needs and requirements; however, here are a few examples:

Customer Experience (CX)

CX effort: These workflows identify when how hard (or easy) a customer has to work to engage with your brand, such as if it takes them multiple attempts to connect with the right support person, having to repeat their reason for contact, etc. Paired with a customer effort score (CES), CX teams can take the right measures to reduce friction and frustration in the customer journey.

Customer satisfaction (CSAT): This measures a customer's level of satisfaction or dissatisfaction, alongside other instances of escalation or complaints. Understanding CSAT can help with targeting specific customers for direct outreach or identifying patterns for improvement at scale.

Emotion: Emotion goes beyond the basic positive or negative sentiment indicators to measure emotions such as anger, disgust, fear, satisfaction, happiness, and excitement. Understanding emotion can help CX teams and agents drive significant improvements, such as properly serving vulnerable customers.

Churn risk: Retention is critical in today's economy. This workflow helps CX teams understand indicators of churn, such as mentioning a competitor or a cancellation, and address churn-likely customers before it's too late.

Sales

Sales effectiveness: This workflow tracks an agent's use of sales techniques when making and closing an offer. Using a sales pitch score, agents and supervisors can understand when the right product descriptions, pricing, benefits, or other language is used. Analyzing these scores can help supervisors properly coach effective sales techniques, and connect behavior to revenue gained.

Script adherence: For sales teams that use scripts, script adherence can determine whether agents are using the correct language to close an offer. Like sales effectiveness, this workflow can be leveraged to improve sales outcomes.

Marketing

Brand sentiment: Marketers can monitor omnichannel brand sentiment. Equipped with this information, marketers can make smarter decisions about campaigns and take action to avert brand crises before it's too late.

Spend optimization: This workflow can aid marketers in attribution, determining whether spend in a particular channel led to the intended outcomes. It can also help with A/B testing, allowing marketers to test versions of their campaign language to determine what drives the best results.

Campaign effectiveness: Marketers can uncover top trends, topics and market responses, or surface compelling user-generated content to inspire campaign ideas. Authentic customer feedback can help teams better understand drivers of campaign effectiveness and make strategic improvements.

Ensure cross-organizational alignment with executive reporting

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Getting the right information to the right executives in the right format is critical. Across all departments, executives need high-level data about what's happening with employees and customers — and why. Executive reporting workflows further increase the usability and visibility of data across the organization, enabling teams to take action on trends and understand the impact of performance on the bottom line.

The most effective solutions provide executive-level dashboards, which go beyond charts to provide contextual information about why certain trends occur. Dashboards should highlight major deviations from KPIs, and automatically notify the right executives based on an organization's hierarchy or structure.

Driving ROI and AI usability with workflows

As demonstrated by the examples above, workflows can help your contact center function more efficiently and effectively. They can also elevate customer insight outside the contact center, and make those insights actionable for the rest of the business.

When implementing any type of AI, including within a conversation intelligence platform, focus on the outcome you're aiming to achieve or the value you're trying to drive for customers. This will help you determine the workflows you need to reach practical outcomes with your AI systems. When equipped with the right workflows, your team can generate near-immediate value and prove the ROI of these technologies to your organization.

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About CallMiner

CallMiner is the global leader in conversation intelligence to drive business performance improvement. Powered by artificial intelligence and machine learning, CallMiner delivers the industry's most comprehensive platform to analyze omnichannel customer interactions at scale, allowing organizations to interpret sentiment and identify patterns to reveal deep understanding from every conversation.

By connecting the dots between insights and action, CallMiner enables companies to identify areas of opportunity to drive business improvement, growth and transformational change more effectively than ever before. CallMiner is trusted by the world's leading organizations across retail, financial services, healthcare and insurance, travel and hospitality, and more.

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