

zoom

Getting started with AI in the Contact Center



A practical guide to implementing AI in your
contact center without losing the human touch



Table of contents

- 03** Customer Experience AI: Why it's here to stay
- 05** Into the unknown: Common AI challenges
- 06** How will contact center AI help my organization?
 - 07 How AI helps your agents
 - 09 How AI helps your customers
 - 09 How AI helps your entire business
- 12** Five steps to contact center AI greatness

Why it's here to stay

No matter which way we turn, we're all hearing about AI. Generative AI (GenAI) in particular, has been a buzzword in meeting rooms, at kitchen tables, and on social networks across the globe. And there's serious substance to the hype. According to a [recent McKinsey report](#), GenAI could add trillions of dollars to the global economy. If you're not jumping on ways to implement AI, there's a chance you'll fall behind your competitors, not to mention having to answer to your executive team and board members.

When it comes to the contact center, AI has quickly become a dominating theme and will no doubt lay the groundwork for what's to come. [Recent research from Omdia](#) predicts that in 2024, AI and machine learning will be a very important part of 61% of enterprise companies' digital strategies. With [customer expectations on the rise](#) and teams becoming more widely dispersed, AI can help create efficiencies and empower agents to provide the kind of care customers demand now and in the future. In fact, Metrigy's recent report "Transforming customer experience - 6 vital projects to help improve CX", found that when companies use AI for customer engagement, they increase revenue by an average of 19.6% and improve customer ratings by 20.5%.

We've seen these results first hand at Zoom, where our [intelligent virtual agent helps us save a staggering \\$13 million each month](#) and generate a 95% CSAT for our support teams.



19.6%

AI has helped companies increase revenue from by an average of 19.6%

Metrigy report "Transforming customer experience - 6 vital projects to help improve CX"



61%

AI and machine learning will be a very important part of 61% of enterprise companies' digital strategies

Source: Research from Omdia, "IT Enterprise Insights: Contact Center - 2024"



\$13 mln

Zoom Virtual Agent helps us save a staggering \$13 million each month and generate a 95% CSAT for our support teams.

It isn't about automating everything so your customers never deal with a human. It's about enabling human connection, providing the personal touch your customers crave with the help of automation.



When preparing your contact center AI strategy, it's important to remember this:

- It's leaving your customers with that warm fuzzy feeling they can only get after a seamless customer experience.
- It's helping your agents feel more empowered, giving them time back to deal with complex queries more effectively.

As Gartner pinpoints in their [recent research](#), *"We expect that customer service and support leaders who leverage GenAI to enable human contact will be more successful than those who leverage it to reduce human contact."*

But with so much information about AI, figuring out where to start implementing it in your organization can be a minefield. **When dealing with customers, it's essential to tread carefully and avoid jumping on the GenAI hype without a plan.**

In this essential practical guide, we break down all the benefits AI brings to your contact center and share some steps you can take now to start developing an AI-powered contact center that amplifies the human touch your customers crave.



Common AI challenges

No doubt you're facing one or all of the challenges below. You're not alone! Let's look at the most common obstacles when considering how to effectively get AI off the ground in the contact center.

→ Hard-to-predict ROI

Predicting return on investment (ROI) can feel like trying to hit a moving target. But by taking a thoughtful, step-by-step approach (as we've laid out in this guide), you'll see where AI can make the end goals of higher customer satisfaction and increased agent productivity and engagement much easier to reach.

→ Cost implications

We get it; investing in AI can feel like a hefty check to write. But don't let the dollar signs scare you away just yet. With the right strategy, AI can actually be a budget-friendly addition to your contact center arsenal. For instance, you can start saving almost instantly by deploying a virtual agent as a support alternative to facilitate easier self-service and shorten handle times for customers who do require an agent. And if you're a Zoom customer, AI is included in your account with your paid services, but more on that later.

→ Training and roll-out

One of the biggest stumbling blocks in AI implementation is getting your team up to speed. From training sessions to hands-on support, the right innovation partner can make AI rollout a smooth ride for everyone involved. In many cases, low-code or no-code technology (including GenAI) makes creating and training chatbots and tweaking workflows far simpler these days than just a few years ago.

→ Lack of a plan

"Fail to plan: plan to fail," as they say. This couldn't be truer when thinking about how to implement AI in your contact center. Without a clear vision, you might find yourself wandering aimlessly in the digital wilderness. With a solid plan, you can ensure your AI implementation is smooth sailing.

→ Data privacy concerns

Of course, the safety and security of customer and company data is beyond critical. In a sea of new and untested models and vendors, how can you be confident that the one you pick is a trusted organization? It's important to understand how a vendor will use your data for training their AI models or how they share data with third-party AI models. Choosing a responsible vendor is perhaps the most significant decision you'll make.

→ Lack of knowledge

When it comes to AI, do you feel like you're diving into a pool's deep end without your water wings? Fear not! One of the biggest hurdles in implementing AI in your contact center is simply not knowing where to start. But hold on tight; we hope this guide will set you on your way, and if you need more information, we can partner with you to make it an even easier ride.



How will contact center AI help my organization?

You've undoubtedly heard the news — AI can help your contact center business — a lot! But how? As Forrester outlines in their trends report, [Generative AI: What it means for customer service](#), GenAI is best used to support agents by improving content creation, accelerating data analysis, and streamlining agent workflows. The report also stated that good conversational design practices are necessary for customer-facing applications like chatbots.

Let's start with your most important asset: your agents. Then, we'll explore how AI can help your customers and your business as a whole.

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Contact center agent turnover is 30–40%. When AI is implemented successfully agents spend less time on low-value tasks, empowering them to engage in much more meaningful ways.”



Juanita Coley
CEO of Solid Rock Consulting

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**Beyond the Buzzword:
AI in the contact center**

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How AI helps your agents

AI can help your agents do their jobs better in a couple of simple but effective ways, empowering them to serve customers faster and more effectively. But more than that, they get time back to do more meaningful work, spend more time with customers on complex queries, and add more value to their interactions. Let's dive deeper.

Reduce frustration and attrition

Repetitive tasks create high rates of contact center agent attrition. As Juanita Coley, CEO of [Solid Rock Consulting](#), notes: “Contact center agent turnover is 30–40%. When AI is implemented successfully agents spend less time on low-value tasks, empowering them to engage in much more meaningful ways.” Then there's the impact on the customer. We've all been in that frustrating scenario where we have to repeat ourselves as we get moved between customer service agents.

Capabilities like **AI-powered auto-summarization provide context-rich summaries** that help individual agents and contribute to an improved team experience. Agents no longer have to waste valuable time after each call writing lengthy notes, allowing them to move more quickly to the next call or spend more time on complex queries. Plus, the ability to give the next team member the context to better handle transferred or returning customers reduces call durations and agent and customer frustration.

Empower agents and enable faster call resolution

Another way AI helps agents is by giving them the knowledge they need to do their jobs effectively, making their roles more straightforward and rewarding. AI can scan the knowledge base, CRM data, or business applications and provide quick access to the relevant information agents need when they need it. By surfacing information on the spot, agents no longer need to dig around for appropriate articles while the customer waits impatiently on the line. Faster call resolution is not only great for your customers, but it also gives agents time back to tackle more challenging (and meaningful) work.

Keep agents more engaged and on top of their game

Keeping your team engaged is crucial to help prevent agents from jumping ship, and it's equally essential for creating better customer experiences. With contact center teams becoming more widely dispersed, gone are the days when supervisors could give their team members a high five in person and provide feedback on the spot. You can't replace a supervisor with AI, but AI can help supervisors support their distributed teams.

Quality Assurance (QA) is an area where AI really makes a difference. Only a small subset of interactions can be analyzed with more traditional QA tools. AI-automated QA is possible on every single interaction, giving you a more thorough and truthful picture of what's going well for your agents and what needs work. This data offers supervisors the opportunity to coach and acknowledge great work with evaluations and built-in scorecards, making agents feel valued no matter where they are located.



“AI can answer questions instantly. I know it’ll be a tool that educates clients across the globe really easily.”



Andrew Lindley
Chief Technology Officer at
Vensure Employer Services

Speaking At The Zoomtopia 2023 Conference
zoomtopia



“[AI is] a personal assistant for my agent. It’s somebody who is there to back them up. That’s where AI brings us the opportunity in a contact center environment.”



Caleb Schleder
Director, Technical Services and
Support at Precision Planting

Speaking At The Zoomtopia 2023 Conference
zoomtopia



On top of that, with a good workforce management tool, there's also the ability to **use AI to better predict call volume and call handling time**, which helps supervisors schedule ahead, offer agent autonomy, and analyze trends to improve customer service.

How AI helps your customers

Chatbots are the obvious way AI has helped speed up and simplify the customer experience. The ability to self-serve and get fast answers to simple questions without waiting in a long call queue has been a welcome development. GenAI has advanced chatbot capabilities and enables more human-like responses. But remember, not every customer wants to interact with a bot. Understanding your customers and giving them different ways to connect with your agents is critical to a more balanced approach.

Advances in AI have greatly improved the potential for enhanced intent recognition and question-answering, allowing customer support teams to provide that human touch and a better self-service experience for customers.

How AI helps your entire business

With the increasing need for agents to reach back office experts to respond faster to queries, the contact center is evolving to incorporate your entire business. This has led to the rising trend of combining **unified communications (UCaaS)** and **contact center communications (CCaaS)** into one consolidated platform, a term most recently coined as **MultiCaaS**.



“You have the ability to use AI to help optimize your agent performance, deploy workforce engagement, and create a more efficient operation by making sure you have enough contact center agents available at peak times during your peak seasons.”



Sidney Fein
Director, Technology - Strategic
Platforms & Innovation at Beam
Living

Speaking At The Zoomtopia 2023 Conference
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**Contact center
workforce management:
Surviving the peak
season surge with AI
and more**

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“You give chatbots simpler tasks, not the work of resolving more complex customer issues.”



Melody Brue
VP and Principal Analyst, Modern
Work at Moor Insights & Strategy

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What is MultiCaaS and why is it the contact center of the future?

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ARTICLE

How to transform your CX: new study shows benefits of integrated UCaaS and contact center platforms

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This effectively means having one communications platform for your whole organization, bringing together your employee experience (EX) and customer experience (CX).

Let's cut out the acronyms for a minute. What MultiCaaS looks like in practice is enabling agents to reach back-office experts easily and ultimately empowering them to deliver better service, add value, and feel more accomplished on a single, integrated, easy-to-use platform. That's not to mention the budget and time savings that come with having just one bill for all your communications.

And with one platform bundle from an innovative provider, all employees can enjoy the same AI capabilities across your entire communications stack.

A recent study from Omdia entitled [2024 Trends to Watch: Unified Communications and Collaboration](#) found that AI and MultiCaaS bundles were the top trends to watch. With 63% of CCaaS customers looking to buy a combined UCaaS and CCaaS bundle, according to the report, it's clear that many companies feel the same way. And there's good reason. Metrigy found in their research group that integrating unified communications and contact center solutions resulted in a 26.5% improvement in customer ratings, an 18% reduction in operational costs, a 22.6% increase in revenue, and a 23.1% boost in employee efficiency (Metrigy, Transforming Customer Experience, January 2024).

Integrating unified communications and contact center solutions

63%

Of CCaaS customers looking to buy a combined UCaaS and CCaaS bundle



22.6%

Increase in revenue



26.5%

Improvement in customer ratings



18%

Reduction in operational costs



23.1%

Boost in employee efficiency



*Source: Metrigy, Transforming Customer Experience, January 2024

Here are a few additional ways the MultiCaaS approach, powered by AI, can help your business.

Knowledge sharing for better customer insights.

Great things can happen when your employees can collaborate seamlessly with each other. Not only can agents reach back-office experts more efficiently to resolve customer issues quickly, but they can also become experts themselves. Innovation and product development teams can consult with them more easily to gain customer insights, resulting in customer-led innovation. AI can support these efforts by enabling intelligent handoffs and auto-generated meeting summaries that instantly organize critical information. This data can then be quickly added to the contact center knowledge base and customer and agent workflows.

More efficient operations.

When there's one interface, or one pane of glass, to navigate, your admin staff can be more agile. AI can take the task of writing time-consuming flows from your IT team and make them so simple that anyone on your team can get them going in the time it takes to make a cup of coffee. If your team is familiar with the platform you use for both UC and CC, onboarding becomes much easier and faster.

Deeper insights for better business outcomes.

This is a key area where you can reap the benefits of AI when taking a MultiCaaS, one-platform approach. Consider all the data you can pull across a platform, combined data that surfaces insights that could be overlooked in a more siloed organization. For example, imagine the benefit of your product development team easily accessing customer data from the contact center to lead innovation and product feature design.



Five steps to contact center AI greatness

Where to begin? The bottom line: Don't just dive in. Take a thoughtful approach to AI implementation and ensure it's a cross-functional effort informed by your customers' needs. AI, particularly GenAI, is a revolutionary technology that is new to many of us. Take a thoughtful and strategic approach and ensure you take time to evaluate and correct course where needed.



1

Create a vision

As Forrester pointed out in their [recent GenAI report](#), diving too quickly into your AI adventure can have a negative impact. Too much automation can leave a customer feeling frustrated and demanding to speak to a real person. Not enough automation can leave your customers impatiently awaiting a response and even switching to a more customer-savvy brand. Although AI has been around for decades, GenAI has recently brought it to the forefront. We're all new to this, so careful planning goes a long way. Take a leaf out of Rocket Connections' book, whose [SVP of Business Operations, Stacey Caster](#), shared *"We started an AI Council comprising cross-functional team members at various levels to better establish how we can leverage AI to improve our business."*

Reviewing your current call center or contact center tools is helpful here. Carry out a gap analysis to determine your needs. This [handy call center upgrade checklist](#) can help you identify where AI might help resolve some of your issues.

Call Center Upgrade Checklist

→ Download

2

Take a customer-led approach

Next, take an approach that enables human connection and doesn't reduce it. A smart way to do this is to follow your customer journey and review their touchpoints. Start with your entry points, such as your chatbot and IVR phone system, and then move on to the agent interaction, prioritizing what needs to be done first. Evaluate your customer data to generate insights into opportunity areas.

3

Empower your agents and supervisors

Put yourself in the shoes of your agents and supervisors, and include them in the planning team or AI council if possible. With [54% of customers leaving a brand after a poor interaction](#), your agents are central to creating the customer loyalty and repeat business we're all chasing. A significant way to invigorate your team is to give them all the resources and AI capabilities they need to do their jobs effectively and efficiently.

Implementing AI to help create call summaries and take notes is an easy first step that can help improve your agent's productivity and well-being and boost your CSAT scores.

Many contact centers now have a generative AI tool built-in, making it easy to get started. For example, [Zoom AI Companion](#), which powers call summaries among other value-added AI tools, is available across all eligible [Zoom Contact Center](#) packages at no additional cost.*

Next move on to leveraging AI to amplify your knowledge base. Spot-check patterns and pull insights that can build a knowledge bank to help agents with future calls and give a bump in your first-call resolution numbers. [Zoom AI Expert Assist](#) within Zoom Contact Center, for example, surfaces a treasure trove of relevant information from knowledge bases or connected apps and data sources that were cumbersome to find in the past

Another place you can consider implementing AI to support contact center supervisors is workforce management (WFM). A good WFM tool, like [Zoom Workforce Engagement Management](#), will not only help ensure you have the right number of agents with the right skills available at the right times. It will also leverage AI and machine learning so you can pull data to predict call volume and call handling time. This capability helps you schedule up to four weeks ahead to analyze trends and easily determine your future needs.

4

Evaluate and course-correct

As with any new technology, a certain level of testing and trial and error is in order. The good news is AI can also help you pull deep insights to identify what's working and what's not. Make sure you schedule regular meetings with your AI Council. By revisiting your vision and plan, you'll ensure your contact center AI strategy is solid and can withstand what the future brings.

54%

of customers leave a brand after a poor interaction

(Source: Morning Consult Research on consumer expectations, 2023)



“

“Agents feel like they’re failing because they can’t solve a problem that was brought up before. Sharing information means the team can celebrate victory together.”



Adrian Swinscoe
Principal of Punk CX

*AI Zoom AI Companion may not be available for all regions or industry verticals.

5

Make sure you have the right partner

It's no surprise that AI will play a fundamental role in shaping the contact center of the future. The potential benefits are clear: higher customer satisfaction, a more engaged customer service team, and improved business outcomes. By adopting a practical and human-led approach, as outlined in this guide, you'll be in the ideal position to generate the most value out of AI, without losing your personal touch.

It's essential to partner with a company at the forefront of contact center innovation to help you navigate the unfamiliar territory of AI. At Zoom, we're creating [the next-generation contact center](#) by leveraging our [federated approach to AI](#). We'd love to hear from you and help you on your AI journey at whatever stage you're at.

Strengthen your customer relationships

Talk to a Zoom expert to learn more about the benefits of our Zoom Contact Center

[Get Started Today](#)

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“I believe AI is going to change the game, and we want to be right there with Zoom Contact Center, leading the charge.”



Nick Smith

VP of Client Experience at
Vensure Employer Services



Find out more about:

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→ [Zoom Virtual Agent](#)

→ [Zoom Workforce Engagement Management](#)

Thank you

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