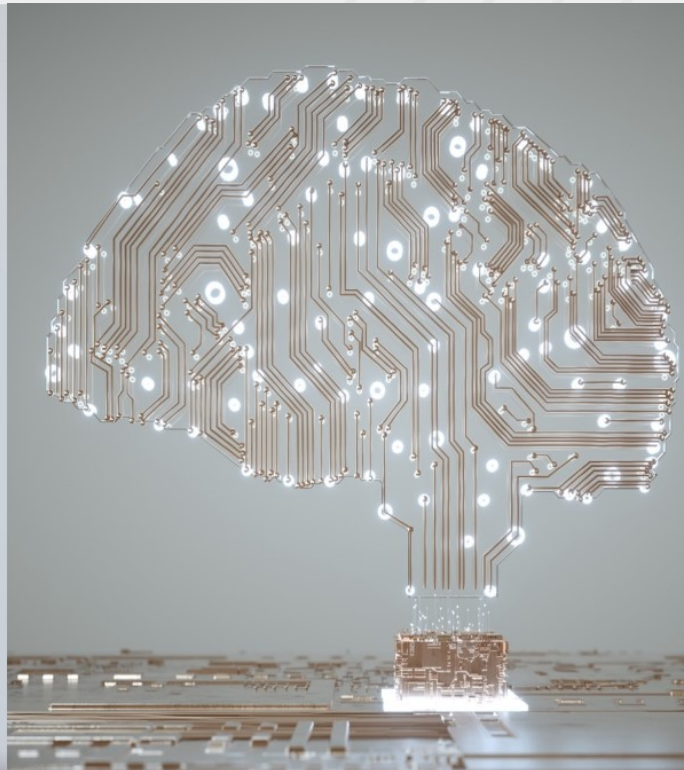


Collaborative Intelligence: The Contact Center in 2023 and Beyond

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Featuring Insights



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Foreword

Although we sometimes talk about artificial intelligence (AI) and employees as disparate forces, the most effective contact centers pair AI and humans to maximize efficiency and customer centricity at each and every touchpoint.

Defined by Five9 as “collaborative intelligence,” this complementary approach to automation and employee performance has begun to provide a considerable competitive advantage. Collaborative intelligence is the difference between contact centers that leverage AI to empower contact center employees (agents, supervisors, and managers) to create real connections with customers, and those that merely use siloed automation to answer questions and process transactions.

“Collaborative intelligence blends the strengths of people and machines to best serve customers. Humans have inherent strengths that machines do not have: We are creative and empathetic, have discerning judgment, and provide leadership. Machines powered by AI are computational, fast, scalable, and accurate. Together, they can deliver a seamless, efficient, and enhanced customer support experience that neither can deliver alone.”



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Thanks to emerging trends and challenges, the collaborative intelligence model will become even more essential and impactful in 2023.

What are these trends? And why have so many previous AI initiatives fallen short? How can you make collaborative intelligence work for you, your customers, and your employees? This Special Report will provide the answers.

Customer Contact Trends You Can't Ignore in 2023

With a recession looming and businesses fearing reductions in customer spending and internal budget cuts, it has never been more important to realign and recalibrate your customer base.

Customers have never had higher expectations for how their brands should behave. Below, we will investigate key trends that surround customer loyalty, employee success, and, of course, the contact center.

Growing Demand for Frictionless, Personalized, Predictive, and Proactive Experiences (FP3)

Today's customers want it all; [95% value friendly interactions with employees](#), but nearly as many become loyal to brands after quick and easy self-service experiences. They expect you to not only know them, but to use that knowledge to reduce friction and anticipate their future needs and challenges.

This challenge is intimidating for contact centers that continue to struggle with long wait times, fragmented journeys, and overly reactive approaches to customer service. A proactive approach is essential to flip this script.

Evolving Omnichannel Behavior

It is not enough to be present on most channels. It is not even enough to excel in them. The best journeys leverage a cohesive combination of different channels to deliver the most convenient, relevant, and personalized experience for customers across every touchpoint.



To illustrate this concept, let's look at an example of a retail customer experience.

Step 1: The Online Shopping Experience

Consider Rob shopping for a new shirt: He visits his favorite online clothing store. He picks out a few shirts and then starts a chat with a live personal stylist to ask questions about sizing and material. The chat helps him decide what to buy, and he orders two new shirts.

Step 2: The Online Return

When he receives his new shirts, he tries them on, but he is disappointed to find one shirt does not fit and needs to return it. He goes to the store's website, interacts with a digital chat Intelligent Virtual Agent (IVA) to initiate the return, and inputs his transaction information and account information. The digital chatbot sends a printable shipping return label with instructions on how to ship the return.

Step 3: Refund Status Tracking

Later, Rob calls the customer service line to inquire about the refund status and is helped within seconds by a virtual agent. The AI-Powered virtual agent sends a form to Rob's phone, where he fills in the order number and email address so he can quickly track the status. Then the virtual agent informs Rob that the refund was delayed and offers to connect him with a live agent for more information. The live agent confirms the delay due to an internal error, assures Rob he will receive his refund in three days, and provides a cash coupon for his next purchase.

This seamless customer experience is desirable but unrealistic if any aspect of the transaction does not go perfectly well. The live personal stylist had to be helpful and respectful when making the shirt sale. The self-service digital chat agent had to work quickly and easily to provide intuitive engagement by collecting Rob's information and sending a return label in an attachment. The voice virtual agent had to hear the issue and respond promptly, alleviating the possibility of Rob waiting on hold for an extended period. It offered a multimodal experience by providing a form so Rob could enter his information to track the status. The virtual agent also transferred the call to a live agent seamlessly. And the automated technology that deposited the money back into Rob's account needed to work accurately and efficiently, building trust between Rob and the brand.

"Meeting customers on their own terms has never been more critical for customer retention and satisfaction. They expect conversational self-service, a consistent experience, and seamless journeys when they move across channels as well as between virtual and live agents. The latest AI and collaborative intelligence innovations can help companies create the most personalized and efficient service possible, making customer experiences more fluid."



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[Only 20% of contact centers believe they are seamlessly connecting their channels](#); the percentage that is meaningfully orchestrating journeys across those channels is far smaller. A new option for blending technology and human output is essential.

The Vogue of Employee Experience

Employee engagement and productivity have long been difficult for the contact center, and recent trends only exacerbate this challenge. The Great Resignation led to a wave of exits from contact center environments. Furthermore, impending cost-cutting will limit companies' capability to hire more people.

If this wasn't bad enough, these resourcing concerns are emerging at a time when agents are expected to handle more complex work for more demanding customers. At the same time, agents do not get relief from mundane and repetitive work. With so many gaps in the needs of the contact center (and its customers), a collaborative solution is necessary. Unfortunately, many leaders are having trouble implementing the cure.

Challenges Inhibiting Customer Centricity

Though the stakes and drivers may be evolving, concepts like reducing customer effort, increasing personalization, unifying channel experiences, and empowering employees are not brand new. Customer contact center leaders have long been attempting to achieve these objectives, and recently they have seen some success by adding AI capabilities. But most companies have not been able to use AI to its full potential.

The following section will uncover the challenges and obstacles these leaders are facing when bringing solutions to their contact centers.

Ineffective Balance of Self-Service and Live Agents

[Although 86% of customers are willing to self-serve for some or all issues, only 15% have confidence in modern self-service tools like chatbots.](#) As a result, though customers lament the long wait times and repetitive questions, they overwhelmingly view a live phone call as the most trusted support option.

More than showing a preference for the phone call, these statistics speak to an ineffective approach to self-service and agents.

Most companies invest heavily in AI and self-service but are unable to build and maintain customer confidence. Companies are delivering impersonal, unhelpful self-service experiences that amount to little more than a Frequently Asked Questions (FAQ) page. When customers seek a self-service option and encounter unintuitive digital agents, they lose faith in these channels and continue to rely on the phone. This keeps call numbers, call costs, and call wait times high.

Worse, [because only 11% of companies say they consistently provide agents with context from self-service escalations,](#) the agents are neither efficient nor personable during the call. Forced to ask repetitive questions and fumble over details, it's no wonder that two-thirds of customers do not feel agents know or care about their issues.

It is critical to identify and remove touchpoints that lead to frustration while creating clear conversational designs

that can contain customers in self-service channels and escalate to a live agent when needed.

Insufficient Data

Perhaps you have your customer's name, email address, preferred method of contact recorded, and some basic AI insights, but do you have much else? Many companies are not unlocking valuable intelligence about their customers' experience and agent performance.

In turn, they cannot feed necessary insights to frontline agents, digital agents, or experience designers. Contact center leaders cannot understand where breakdowns happen, how to avoid them, and how to drive continuous improvement. Valuable insights are required to pinpoint where bottlenecks happen in customer journeys across contact channels to increase positive interaction outcomes.

Although many agents believe customer data is insufficient or absent completely [\(59% of companies say they do not have enough real-time data\),](#) they would have no easy way of finding it anyway. [Forty-nine percent \(49%\) of agents cite difficulty accessing data about customers and their journey as one of their largest pain points when supporting customers, while 30% say their options are too limited to do much good.](#)

Ineffective Knowledge and Training

Agents are not simply lacking access to personal customer insights; they also lack access to core product and process knowledge.

Knowledge bases tend to be out-of-date and inconsistent. In CCW's close-of-year market study, improving knowledge represents the number one New Year's resolution for contact center leaders.

Agents working remotely may have less access to peers and supervisors who can help them navigate through outdated or technologically confusing systems. For brands that are still navigating the best coaching methods in the hybrid world, remote employees may also lack access to the personalized, high-quality training they need to truly demonstrate expertise and empathy during interactions.



Faulty Workflow

While many at-home work setups consist of multiple screens on a single desk, every worker has a limit. [Ninety-one percent \(91%\) of companies say that their agents have access to multiple screens, sometimes reaching double digits, when supporting customers.](#) This makes it more difficult for agents to quickly find crucial information quickly when customers are on the phone and already agitated.

An additional [68% complain that there are too many manual processes](#) and not enough use of AI and automation, leading to too much time spent on low-value work that could have been done by a bot or virtual assistant.

Employees who lack the tools to regularly satisfy customers spend hours hearing complaints and upsetting words from customers every day. This can damage their desire to work through complex problems and convince them to resign.

Even if they stay with the company from an employment standpoint, they will not be as productive as possible. Agents forced to waste time looking-up information or handling rote tasks are agents who cannot properly converse, empathize, and build relationships with customers. They, ironically, will offer little more than what can be achieved by chatbots: collecting basic information and reciting generic, highly scripted answers, and resolutions.

The Collaborative Intelligence Approach: Keys to Success

We know why action is so essential. And we know why the old way hasn't been working. But why is collaborative intelligence the answer?

Put simply, to effectively support customers, **businesses need a true collaboration between humans and machines.** It also means changing the way people think about AI and creating a new workforce of the future.

When companies embrace a collaborative intelligence approach, they don't think of AI as a replacement for agents and employees but as a force multiplier to help them work smarter. This approach helps design customer journeys by clearly identifying the use cases apt for AI and defining what can be best handled by humans vs. machines.

This means adopting self-service that can assist with routine tasks like late shipping, change of address, and forgotten passwords, while live agents deal with the niche problems that require specialized attention.

With the right combination, companies can operate effectively, scale quickly, and achieve cost reductions while delivering the most empathetic and personalized experiences by using humans at the right touchpoint of the customer journey. This approach creates opportunities for people to play a higher value role in their organizations.

What does it take to get there? **Here are some keys to success:**

1. **Adopt the Right User-Centric Platform**

To act on the values of collaborative intelligence, companies must implement sophisticated AI technology. With disconnected and dated technology, this level of experience is almost impossible to facilitate.

To deploy AI that amplifies the abilities of humans in the contact center, a new generation of tools is required. Practical AI technology is critical to build and train the AI that will assist their customers and employees. And the models upon which the AI is built must be continually trained to learn and improve outcomes.

With better trained and optimized AI technology, companies can also build more meaningful self-service experiences. Companies can build and train language models to understand customers and better communicate on digital channels. When customers want low-touch, seamless support they can trust so the digital workforce will meet their needs in a meaningful and human way. Further, companies can increase confidence in self-service, creating a more positive experience for customers and positioning it as a key tool for seamless and intuitive resolutions.

The right platform involves cloud-based, low-code development tools and an omnichannel solution that unifies all touchpoints, supports robust integrations with other key platforms and databases, harnesses the power of conversational AI, and enables limitless scalability and feature upgrades.

When sourcing this technology, look for a no-code development tools that enable non-technical administrators to build sophisticated self-service and agent assist applications easily.

Indeed, even if a technology sounds like it could be a contact center's saving grace, it will never work unless it is cost-effective to implement and easy for employees to use.

When looking for easy-to-integrate technologies, one of the most important aspects to notice is how the technology supports the bot-to-agent transitions. Human and virtual agents should be working as a team, not competitors. In other words, **technology needs to be supporting employees, not making their jobs more difficult.**

Ricoh, a leading information management and digital services company, was able to tick all these important boxes when updating their Virtual Agent experience:

[Ricoh] deployed Five9 Intelligent Virtual Agent (IVA) to empower customers to self-serve for routine technical issues like password resets. The IVA also automates service ticketing when live assistance is needed, which reduces call times by as much as three minutes. Additionally, Ricoh USA, Inc. is using Five9 Agent Assist to provide real-time coaching for agents during customer interactions. Using IVA and Agent Assist has created more meaningful work for agents by giving them more time and confidence to handle complicated requests.

- Five9 Reimagine CX Awards

If a new technology is introduced that will give agents access to the customer's entire brand history but makes it harder to view this information, it probably is not the right technology for you. On the other hand, if the technology and the employees are able to play to each other's strengths by transferring the data back and forth, using common components and workflows, the customer experience is likely to feel seamless and unified for all stakeholders.

2. Make the Most of AI

Far too many organizations take a reductive approach to AI, designing bots that are little more than fancy FAQ pages.

In the spirit of collaborative intelligence, leading brands will harness the full power of AI to elevate all facets of the customer contact operation.

Key opportunities:

- Use natural language processing (NLP) and conversational AI to enable customers to engage in meaningful, organic self-service conversations. These exchanges are more likely to solve problems and are certain to capture valuable intelligence that can be passed to agents and CX leaders.
- Leverage real-time translation to facilitate seamless agent-to-customer conversations without having to hire for every language.

- Analyze conversations to detect real-time sentiment and intention, and then intelligently route (or escalate) customers to agents as needed.

AI can bring together the strengths of your employees and technologies to curate a personalized and exceptional customer experience.

“With collaborative intelligence, AI can provide real-time analysis of intents for both human and bot conversations while providing end-to-end visibility into contact center trends. These insights empower supervisors, managers, and the company to monitor, measure, and identify data on critical KPIs.... Leaders can evaluate performance in real time as well as historically, ensuring data can be turned into actionable insights.”



Sarika Prasad
Five9

AI and human ingenuity, when paired together, have the opportunity to unlock collaborative intelligence and make the contact center better. However, the right platform is crucial to developing such a positive union.

3. Agent Assist

While AI is great for supervisors to monitor employees, Prasad looks out for the agents as well. In her interview with CCW, Prasad told us, “For agents to truly focus on the customer and deliver an empathetic, personalized, and caring human experience, contact centers need to remove the busy work during calls.” The software company leader says that this is where Agent Assist comes in.

Agent Assist creates collaborative intelligence by providing real-time guidance and coaching to agents. Agent Assist can also listen to the conversation and take notes or provide support with tasks that would take the employee's focus away from the customer.

As ideal as this sounds, we know that not all technology is created equally. When seeking out Agent Assist technology, look for features that truly take tasks away from your agents rather than adding more to their plate.

For example, consider using Agent Assist technology that has an AI checklist — ensuring the agent completes every task in a conversation necessary to have a high-quality interaction — and provides real-time data and coaching.

It could further be beneficial for Agent Assist technology to process payments securely or even conduct a survey. Additionally, agents should also be able to rate and review the Agent Assist technology, ensuring that the AI is constantly improving and learning how to tailor itself to your company's specific needs.

4. Involve Employees in the AI Journey

Despite agents' crucial involvement in digital interactions and self-service, the majority of companies do not include agents in their technology implementation and optimization processes, instead relying on the voices of professionals that will not be using the technology every day. This leads to systems that feel frustrating and inefficient for the actual users.

Instead of making decisions **for** your agents, consider making decisions **with** your agents. Build a culture where every employee is actively involved. This not only establishes buy-in to the new technology but helps decide which tasks to dedicate to technology and which ones to leave to the humans.

“Most often, companies are unable to identify...what can be best handled by humans versus machines. Contact center employees become apprehensive about technology moving into functions that were once human-led.”



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This increases the importance of creating an environment where employees are educated about the technology they are using. Rather than fearing it, they feel empowered to use it to grow into high-value roles within the organization.



Putting Recommendations into Action

It can be daunting to find a platform that truly drives collaborative intelligence in the contact center. There are organizations, that have not only used this advice to integrate vital technologies seamlessly into their contact center but have had measurable success. In doing so, they have also elevated their agent-to-agent and bot-to-agent communication.

Take [Ygrene](#), for example. Ygrene, a company offering an alternative way to finance energy-efficient and renewable energy upgrades for residential and commercial properties, was struggling with some online performance issues. To better serve its customers, the company decided to migrate from a cloud platform to one that would improve uptime, provide interactive voice response (IVR), and include intelligent virtual agents (IVA).

Once they implemented their new platform (and ensured their agents knew how to use it effectively), the effects were almost immediate. Average handle time dropped by 50% while abandoned calls became nearly obsolete.

Regarding their updated system, an executive at Ygrene says, “When a call comes in, the IVA routes the caller to the right department and the right person (...). Representatives get the customer information they need immediately.”

Now that their technology is no longer their primary concern, the company reveals that **they have more energy and resources to focus on the customer experience** – exactly what they were aiming for.

The Road from Here

Between live agents and AI-driven digital agents, there are some big issues with the contact center the way it is. However, all hope is not lost. With low-code, easy-to-integrate tools like Agent Assist and AI-powered automation, your brand can create an omnichannel experience driven by collaborative intelligence.

When implementing these technologies and improving the experience of your agents and self-service options, make sure that you set clear metrics you hope to reach over time.

“Decisions can’t just be based on the hope that AI will improve things. AI needs a plan. Defining improvement metrics is important. Otherwise, it is easy to go down a path of tinkering and tuning that does not translate to business results.”



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If your AI goals are not being reached with your current technology, change it. Do not be afraid to pivot into a different direction — the longer you wait, the more damage is caused.

In the example of Rob shopping for a shirt, we mentioned how important it was that every aspect of the transaction goes seamlessly. When collaborative intelligence works, it doesn’t just ensure no issues arise with these experiences, but that it is personalized, predictive, proactive, and above the baseline expectation. Whatever the purpose of your contact center is, it is possible to make the experiences of employees and customers beyond their wildest dreams.

All it takes is a little collaboration.

About the Author



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Christine Ducey is an analyst and staff writer for CMP Digital. Christine comes from a background in teaching secondary English education and B2B Sales.

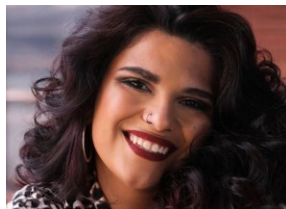
Her current work highlights the latest trends and opportunities for the customer experience industry. She has a special interest in sustainability, ethical marketing, streamlined technology, and customer care.

Christine studied English Literature and Cultural Studies at Fairfield University and has held positions with Teach for America and innovative technology startups.

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