

CHECKLIST

What To Look For In a Contact Center AI Partner

Whether you're an operations leader at an F500, or a quality analyst at a unicorn eCommerce company, there are key things to look for when selecting your predictive analytics, QA, and coaching workflow provider. Most importantly, it's all about finding the best fit for your entire team to use as its source of truth.



Transcription Accuracy

The quality of predictive insights rests in the accuracy of the AI services doing the analysis.

- What guaranteed minimum transcription accuracies? Are they included in the SLA?
- Does the solution analyze only text-based analysis, or also raw audio (e.g. tone)? Are transcripts immediately processed?
- Do they have a dedicated product team for real-time interaction analysis?
- Does the Platform automatically and selectively redact PII?

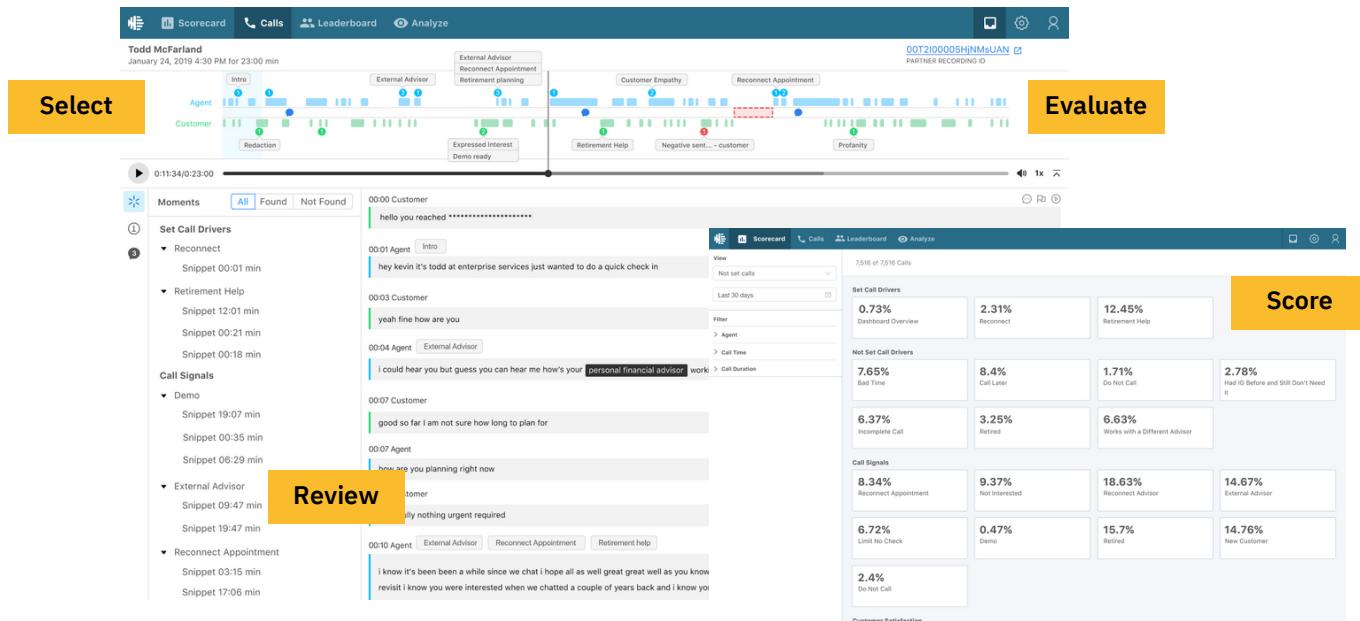
BENCHMARK 80% TRANSCRIPTION ACCURACY



Contact Center Expertise & Culture

Social media, employee bios, and Glassdoor can tell you a lot about the team's expertise and culture

- Where did people in roles like machine-learning, product, speech analytics, customer success, and on-boarding work prior? Do they have real-world contact center experience?
- Have they secured AI-related awards and publications?
- What do employee reviews say about the culture ?





Customer Success

Testimonials, reviews, and dedicated professional services at no-cost show a dedication to customer services

- Does the team have dedicated customer success and onboarding teams beyond technical implementation? Do they charge more for professional services, or include them?
- Do they offer guidance on how to leverage the platform to achieve maximum ROI -- in the first 30 days of go-live?
- Are integration and onboarding included, or part of an additional set-up cost?
- How often do customers meet with their CSM? What custom reports are included at no-cost?



Fast Time to Value

Time to value is directly correlated with implementation and onboarding.

- Can the partner share a case study from a similar client highlighting the value they drove in the first 30 days post-contract?
- Does implementation require professional services, custom development, and deployment?
- Once implemented, do they include guided on-boarding and re-training/up-skilling for new users?



Ease of Use

It's critical that every level of your team can adopt the Platform and easily operate their workflows.

- How easy is it to derive day-one value from the platform? Does integration take 2-4 weeks or less?
- Does every level of the contact center team - including agents and supervisors - log in daily?
- Are there pre-built interaction analytics, reports, and dashboards? Can you customize user permissions and views in just a few clicks on our own?



Built-In QA & Coaching

Turn insights into action with built-in QA & coaching.

- Once the analysis is done, how easy is it to conduct QA or coach with the insights?
- Can you analyze, evaluate, and coach in a single view, or do teams have to juggle multiple tools and spreadsheets?
- Are interactions auto-suggested to you for deeper review? Does the Platform predict customer intent/frustration, or proactively surface compliance gaps, potential fraud, and coaching opportunities?
- What can of Metadata can you use to sort and filter?

75%
OF CUSTOMERS
SAY SERVICE
LEVELS HAVE
DROPPED DURING
THE PANDEMIC.



Innovation

Grow and innovate with a world-class product & machine learning team.

- What "big bets" is the company placing in your market
- What % of funding goes to R&D & acquisitions?
- What roles have they recently hired or are open now. When did they secure their last round of funding?



Observe.AI is Contact Center AI

Observe.AI, a leader in Contact Center AI, transforms customer experiences and improves agent performance by helping top brands analyze 100% of calls and streamline quality assurance workflows. With Observe.AI, businesses transcribe every call with high accuracy and coach agents while gaining full visibility into their customer service operations.

Observe.AI brings the power of agent assistance, automatic speech recognition, and Natural Language Processing (NLP) to modern contact centers and their frontline teams. Observe.AI is trusted by more than 150 customers and partners, including Root Insurance, Alcon Laboratories, Tripadvisor, and Pearson.



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A NEW WAY TO ANALYZE, EVALUATE, AND COACH YOUR HARDWORKING TEAM

INTERACTION
ANALYTICS

QUALITY AND COMPLIANCE
MONITORING

AGENT EVALUATIONS

AGENT COACHING AND
TRAINING

Scorecard Calls Leaderboard Analyze Moment

Jerome Murphy on September 29, 2014 10:40 AM for 04:14 min Call ID 171b846f-4542-462c-b601-a96c2a6545d5

Agent Customer

Call Opening Redaction Dead Air Customer Verification

Customer - Negative ... Call Closer

02:33 / 04:14

Moments All Found Not found

Call Opening Recorded Line Found

Snippet 00:23 min Snippet 00:23 min Snippet 00:24 min

0:24 min Greeting Found

May I speak with Not found

Evaluation Form

All changes saved Submit

Opening Agents must begin the call with appropriate call opener. Satisfactory Unsatisfactory Not Applicable

Agent correctly mentioned the company name. Satisfactory Unsatisfactory Not Applicable

Agent promptly and properly verified the customer as per client requirements. Satisfactory Unsatisfactory Not Applicable

EVALUATE CALLS

COACH AGENTS

SURFACE MOMENTS