Flip the Script: Automation Isn't About Replacing Agents — It's About Doing What You Never Could

Move from promise to practice with a three-phased approach to delivering elevated customer and employee experiences – and real ROI – with customer service AI.

Not simply an inescapable conversation topic, artificial intelligence (AI) has become the centerpiece of customer service strategy. According to CMP Research's 2025 Executive Priorities Report, this year's four biggest focuses all involve AI-powered automation.

A whopping 99% of contact centers, in fact, say they plan to maintain or increase their investments in AI technology.

Thus far, however, the relentless emphasis on AI has been rooted more in the technology's potential than in its practical results. Half of contact centers lament disappointment with the impact of their existing AI investments, and with good reason: trust in chatbots remains low, customer journeys remain disconnected, employee experiences remain frustrating, and operational costs remain high.

A consequence of the wrong technology and the wrong customer experience mindset, these challenges are weighing on businesses at a time when the stakes are greater than ever. The time has come to remedy this problem and approach AI from a more value-driven, customer-centric perspective. This report represents your blueprint.

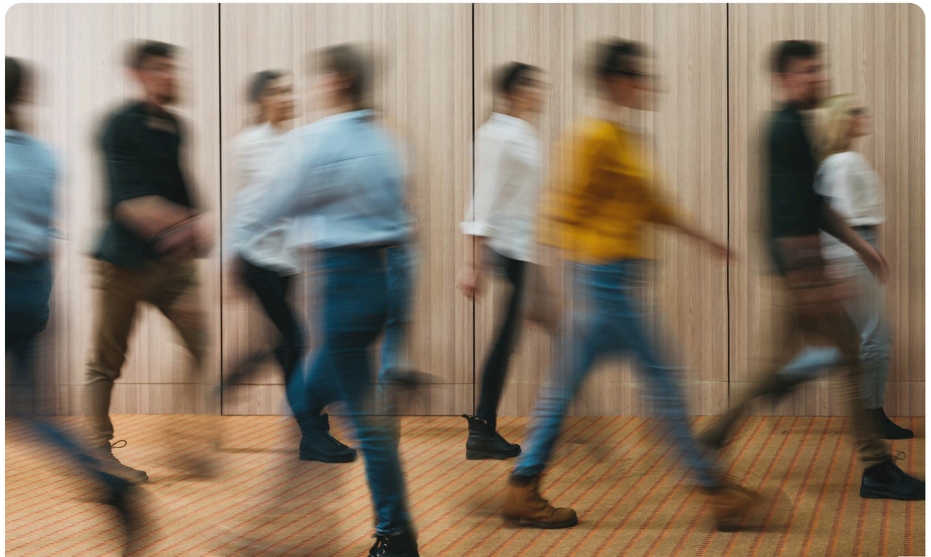
After detailing pitfalls with existing AI implementations, it provides a model for more effectively balancing human and technology in your contact center operation. It subsequently uncovers the AI solutions you should be pursuing, before showcasing a multi-faceted array of benefits.

It is time to flip the script and transform AI from a "good enough" endeavor into a springboard for unprecedented ROI.

Justifiable Hype: Why Today's Customer Service Must Transform With AI

Among contact center professionals, AI continues to dominate strategic conversations, while emerging as the absolute focal point of investment dollars and industry innovation.

This hype is wholly justified, as today's biggest customer service challenges directly underscore the need for transformative technology.



Customer Experiences Remain Inefficient

If time is money, today's customer experiences are exceedingly costly. Three-in-four consumers feel support interactions are inefficient; 47% note that they frequently experience long wait times.

To make matters worse, the waiting may not even pay off. Because employees in 83% of contact centers spend too much time on simple issues and 73% spend too much time looking up information about those simple issues, they are incapable of engaging in productive conversations with customers.

Coupled with inefficient routing that causes customers to endure extra effort only to reach ill-suited agents, it should come as no surprise that more than 87% feel employees lack sufficient knowledge of who they are – or what issue they are facing. This increases frustration, while decreasing the risk of a lucrative connection.

AI Opportunity

Provide customers with more robust self-service options, reduce effort during escalations, intelligently route customers to suitable agents, empower agents with real-time context about the customer and their issue

Cost Pressures Are Considerable

The call to improve customer service efficiency is not simply coming from frustrated customers. It is also coming from business stakeholders.

Going into 2025, nearly 94% of contact center leaders acknowledged that they were facing efficiency pressures. Reducing cost ultimately ranked as the #5 executive priority.

As it deals with this push to reduce costs, customer service is of course looking to grow its support operations. It is hoping to foray into new markets, engage in new contact channels, and expand customer relationships. Indeed, it finds itself in a textbook "do more with less" scenario.

AI Opportunity

Automate inefficient workflows, enable businesses to extend support hours and channels without drastically increasing headcount

Customers Insights Prove Inaccessible

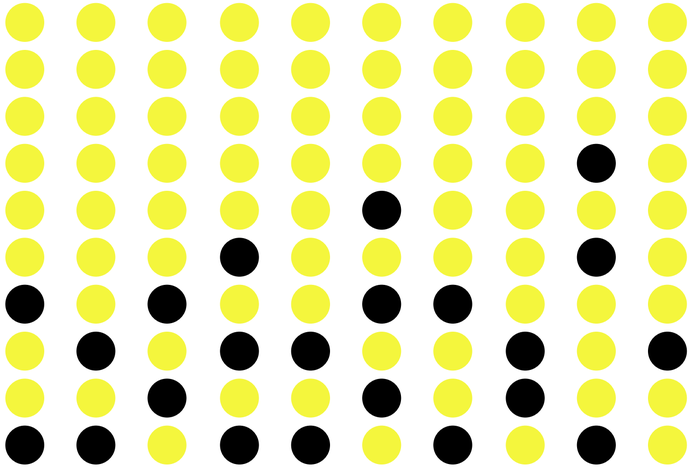
Citing the opportunity to directly connect with customers across myriad touch points, thought leaders increasingly refer to data as the customer service's greatest export.

Unfortunately, customer service cannot export what it does not have. Today's customer contact operations are squandering the data opportunity, failing to capture – let alone unify, analyze, and democratize – intelligence from critical moments of truth.

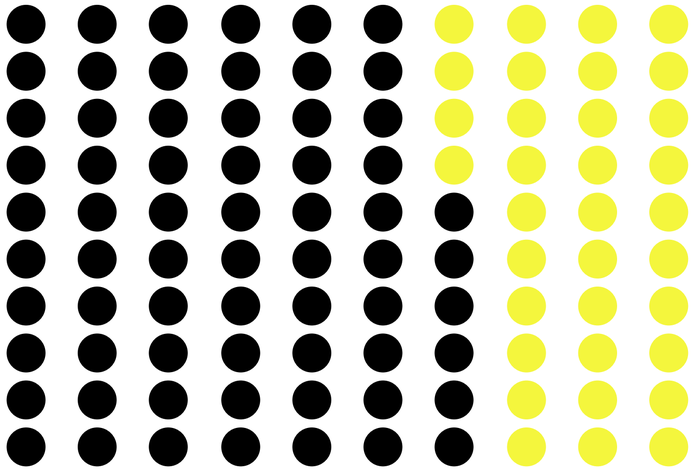
As it prevents businesses from rethinking overall operational strategy, this dearth of data directly impacts the frontline. Only 22% of contact center leaders feel frontline agents have consistent access to the data they need, which explains why interactions come across as inefficient and impersonal.

AI Opportunity

Capture and unify insights from 100% of interactions, surface contextually relevant customer, sentiment, and issue data at key moments of truth, continuously retrain AI with accurate information, empower customer experience strategists with voice of the customer intelligence



Only 22% of contact center leaders feel frontline agents have consistent access to the data they need



Going into 2030, more than 60% of contact center leaders believe their agents will almost exclusively be engaging in these types of interactions

Quality Monitoring Demands Evolution

As customer support conversations become more consultative, traditional quality monitoring becomes less relevant. Today's agents are not simply reading the same scripted answers to the same scripted questions; they are increasingly conversing with customers in a more personalized, unpredictable manner.

Going into 2030, more than 60% of contact center leaders believe their agents will almost exclusively be engaging in these types of interactions. This necessitates a renewed approach to quality monitoring; leaders will require real-time, robust insights into exactly what employees are saying – and the ramifications of that messaging on customer sentiment, compliance, and brand reputation.

Not simply useful for risk management, this caliber of insight will prove essential for training agents on the skills needed to thrive in the next-generation contact center.

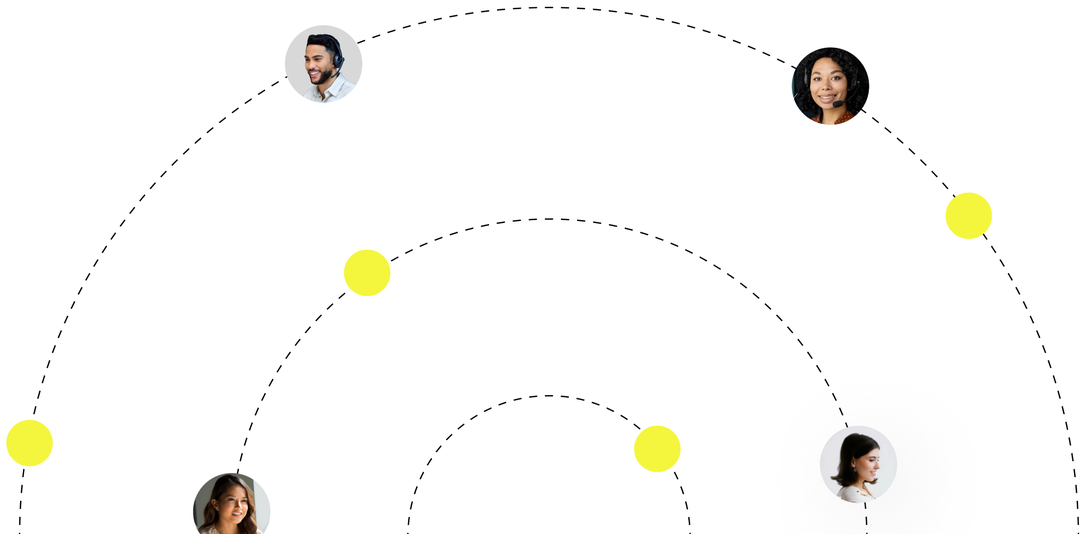
AI Opportunity

Monitor real-time conversations to assess quality, develop personalized training to strengthen agent development

Results Not Guaranteed: Why AI Initiatives Have Missed The Mark

The collective pressure to optimize customer journeys, empower agent performance, reduce costs, uncover actionable intelligence, and achieve a new quality standard represents a great case for AI investment.

This investment has not, however, been yielding the optimal returns. Due to mistakes in how they are approaching the technology and limited understanding about how to recalibrate operations for an AI-driven world, many contact centers are not achieving the necessary transformation.



AI Initiatives Ignore Customer Preferences

A common contact center adage urges brands to “be where their customers are.” Many organizations are not listening, requiring customers to engage with digital, text-based chatbots regardless of their actual preference.

Only 22% of consumers feel they are able to dictate where customer service interactions take place. This disconnect is particularly evident for the traditional voice channel; whereas phone is by far the most trusted support option, 60% of consumers say it is harder than ever to engage with a brand in that channel.

And regardless of where the interaction happens, consumers are facing increased difficulty reaching a live agent. “Trouble reaching a human employee” now ranks as the #1 customer pain point, and 91% say they feel increasingly forced to use chatbots before – if not instead of – speaking to a live person.

In reality, customers very much want what AI offers. About 60% say they would even be willing to use AI self-service for simple issues, and two-thirds feel optimistic in AI’s ability to eventually elevate customer experiences. But when brands make the mistake of forcing customers to use AI in specific channels, they stigmatize the experience. They make it seem like an impositional cost-cutting play rather than a vehicle for customer empowerment.

Customers rebel, demanding to speak to an “agent” before even attempting to engage in the channel. This prevents brands from learning how to improve their AI offerings, while also negating any theoretical efficiency gains.

Ruse vs. Reality: Will Customers Embrace AI Self-Service?

Ruse: Customers fundamentally reject engaging with AI self-service, rendering bots and virtual agents ineffective for anything beyond the most transactional of issues.

Reality: Thanks to disappointing past experiences, it is true that the majority of today’s customers do not yet trust chatbots. However, more than 60% say they would theoretically be willing to use AI for all issues – even complex matters. This means that if AI self-service is deployed correctly, customers will absolutely embrace it as a way to get convenient support on their terms.

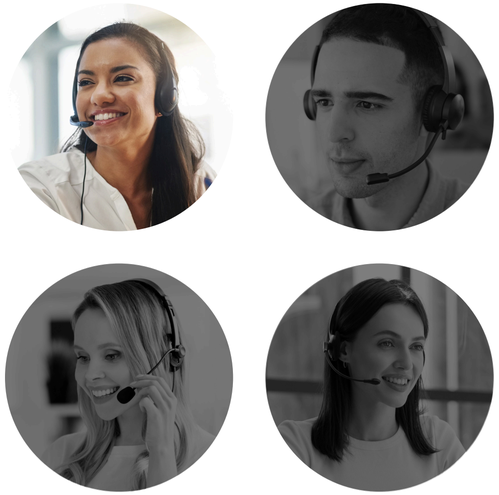
The prospects are particularly bright for voice self-service. As it stands, 29% of consumers are already satisfied with voice AI; an additional 33% are starting to see some promise.

Flawed Approach to “AI for Simple Issues, Agents for Complex Ones”

The idea of using “AI for simple issues so that agents can focus on complex ones” has become ubiquitous, and with good reason. AI is capable of automating transactional support at scale. Upon doing so, it will enable agents to leverage their human ingenuity and empathy to address more personal, complex matters.

The problem is that many organizations neglect the voice of the customer when determining these “simple issues.” They forget that simple questions may still require complex resolutions. They ignore the need to test what a customer endures while attempting to self-serve a so-called simple issue. As a result, they deploy self-service at the wrong moments of the journey, creating customer frustration rather than empowerment.

At the same time, they insufficiently prepare agents for the realities of complex work. Citing inadequate training and hiring, less than one in four contact centers believe their agents are already capable of engaging in more consultative, emotional conversations. Failure to empower these agents with actionable customer data, robust sentiment insight, and the freedom to go off script only exacerbates this challenge.



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Automated Conversations Squander The AI Opportunity

Although the majority of consumers believe in the potential of emerging customer service technology, they are critical of current deployments. Only 24% feel today’s solutions are adding value to the experience.

One of the biggest misses concerns ease of use. In an era where so many equate effortlessness with excellence, businesses are imposing convoluted self-service experiences on customers. They require customers to share repetitive info, navigate cumbersome menus, and deal with stilted, jargon-heavy language.

In short, they are not actually using AI within these automated interactions. They are not using conversational AI to understand customer language, generative AI to deliver highly relevant and personalized messaging, and agentic AI to actually take action and solve problems. They are simply subjecting customers to higher-cost, more effort-intense “FAQ pages.”

As it threatens self-service utilization, this inadequate technology squanders the opportunity to capture the kind of conversational intelligence that broadens customer understanding, improves routing, and ultimately yields more frictionless, personalized, predictive, and proactive customer journeys.

Insufficient Preparation for Changing Workflows

So consumed by their effort to increase AI adoption, contact centers are neglecting an important question: what happens once the AI transformation truly takes place?

More specifically, what does the “AI for simple issues, agents for complex ones” dynamic mean for workflow? How will inbound contact volume evolve once customers trust AI self-service for a greater percentage of issues? How will conversation flows and handle times evolve once AI empowers agents with real-time issue context, sentiment data, and knowledge? How will supervisor responsibilities change as their agents begin to focus on new work – and require new skills and development plans?

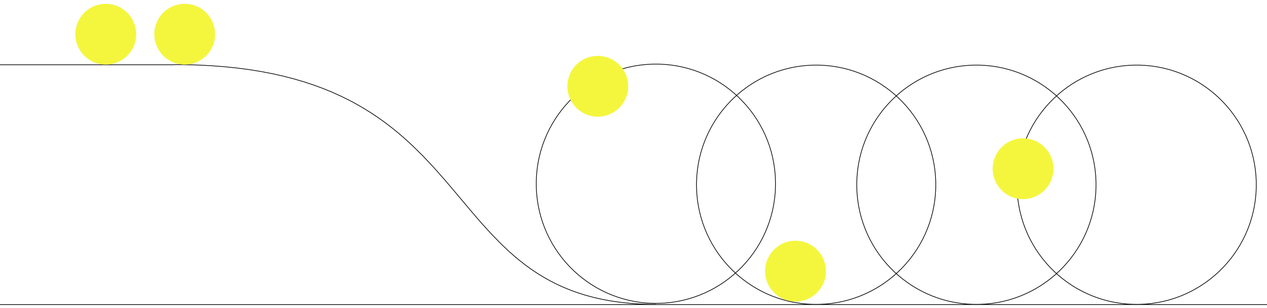
Few businesses have meaningfully answered these questions, preventing them from capitalizing on AI’s theoretical efficiency benefits. They are not creating the optimal framework for success, stunting everything from effective resource allocation, to issue handover, to workflow management, to measurement, to training and development.

The 3A Model: Elevating Customer Contact With Human-AI Synergy

The aforementioned misfires all stem from a common perspective: neglecting humanity when pursuing AI initiatives. Brands are ignoring the voice of their actual customers when deploying AI self-service. They are positioning automated and agent-led interactions as wholly disparate, squandering opportunities to use both in tandem. They are overlooking opportunities to make self-service interactions more intuitive and conversational. They are struggling to use AI in a way that augments agent performance.

To all-at-once avoid these pitfalls, overcome the biggest customer contact challenges, and achieve unprecedented business value, Observe recommends a 3A Framework for AI Transformation: Automate, Assist, and Analyze.

A way to reduce costs, simplify work, elevate performance, and continuously improve, it is a gateway to the ideal customer contact outcome.



Automate: Create Value For Customers On Their Preferred Terms

Contact centers may be wrong about what they have thus far chosen to automate, but they are not wrong that key facets of the customer journey can be automated. The reality is that the most repeatable, rules-based matters can and should be wholly addressable in self-service. Customers will get the outcome they want when and where they want it.

The first step is to identify these “repeatable issues” using an outside-in approach. By analyzing common customer intents and typical resolutions, brands will uncover the right issues for automation. These may not always be the ones that seem “boring” to agents, but they will be the ones that customers will embrace solving on their own.

The second step is to take a more omnichannel approach to self-service, with a particular emphasis on voice AI. Voicebots not only align with the existing preference for phone calls but accommodate more natural conversation. This capability fosters a better understanding of what the customer is asking, serving to not only increase resolution rate but facilitate intelligent routing to the right employee. Since customers say “the ability to seamlessly escalate to a live agent” is the #1 way to increase their trust in AI, an effective voice AI platform will go a long way in building self-service trust – and containment rates.

Ruse vs. Reality: Is Intelligent Routing Achievable?

Ruse: Intelligent routing is a marketing concept, doing little to extend the capabilities of legacy ACD systems.

Reality: Intelligent routing is not only a reality but an essential ingredient in the age of AI. As self-service absorbs simple issues, agents will be freer to engage in interactions uniquely suited to their personalities, experience, skills, conversation style, and social demeanor.

By unlocking more actionable insights about customers and their issues, voice AI solutions can seamlessly route them to the most suitable agent, who is actually available to help due to their optimized workflow. Whereas traditional IVR platforms could only support such routing in about 30% of cases, modern voice AI solutions can double that success rate.

Beyond improving efficiency, this more advanced form of routing ensures customers will receive the more personalized, contextually relevant human support they require in an era where “AI handles simple issues so that agents can handle complex ones.”

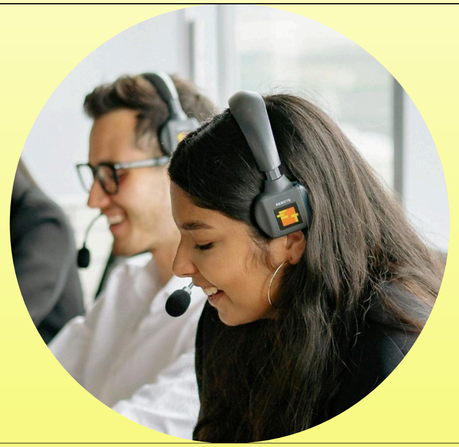
By subsequently measuring satisfaction, callback rate, and lifetime value, brands can confirm that they are containing the right issues in self-service. They will determine whether they are adding value or merely shifting workflow.

On the subject of adding value, savvy contact centers go beyond merely addressing today's "repeatable issues." They also focus on the types of interactions they wish they had the capacity to deliver. Examples may include proactive customer onboarding messages, appointment reminders, and requests for feedback. By automating these types of previously impossible efforts, brands further enhance their relationships with customers – and mitigate any risk of customers feeling like they "traded down" from helpful humans to troublesome AI.

While introducing and iterating customer-facing AI, successful contact centers are also assessing and adapting to the impact on workflow. They are tracking changes in terms of which conversations are reaching live agents in each channel, and reallocating their personnel accordingly. They are also overhauling training and performance measurement to account for evolving agent work expectations.

The Upside

With as much as 40% of your call volume successfully reduced, you instantly achieve cost reduction goals without hurting satisfaction. In fact, customers will appreciate the extra autonomy – and ability to avoid common pain points like waiting on hold or reauthenticating. The ability to reach customers in new ways will increase lifetime value and access to customer intelligence. And with AI fully powering all these tasks, agents can shift to work more befitting their qualities and passions.



Assist: Augment Humanity To Create Happier Agents And Happier Customers

Agents dislike boring, monotonous work. Said work is also costly for the business, as it will be devoting its most valuable resource – people – to low-value projects. The idea of "automating simple work" thus seems like an unconditional win for contact centers.

There are, however, important considerations. Although many agents crave more stimulating and engaging work, they are not necessarily seeking harder projects. If steps are not taken to simplify their work experience, the pivot to the most complex, burdensome customers will turn into a major drain.

Further, if self-service does emerge as a legitimate option for straightforward issues, customers will see agents as their option for more nuanced, high-level support. This means that they will require the skills – and tools – to function as engaging, emotionally intelligent consultants.

The rise of AI is spurring these considerations, and it can also help alleviate them.

The key is to leverage AI as an in-conversation support system for agents. Rather than assigning some conversations "exclusively to AI" and others "exclusively to agents," progressive contact centers let AI and employees work in tandem to maximize efficiency and performance. A voicebot may, for example, authenticate a customer at the start of the conversation and then let the agent jump in when it is time to empathize with and then actually solve the problem.

As it boosts efficiency, this synergy will help the agent come across as more focused, addressing a pain point experienced by nearly 79% of customers.

Beyond helping agents focus on the most critical parts of the call, AI solutions make them better in those moments of truth. Real-time agent assist solutions surface relevant knowledge, data, and sentiment insights, enabling quicker, more personalized, and more empathetic care. This will result in fewer errors, shorter handle times, and stronger overall connections.

Once the agent solves the issue at hand, AI can elevate the wrap-up process. It can automate the call conclusion, closing vital transactions and issuing customer surveys. It can also compile notes, summaries, and analyses from each interaction, providing information that can be useful for agent training, experience design, and business optimization.

The Upside

By using AI to assist employees, contact centers empower the levels of humanity, personalization, and empathy needed to build lasting customer loyalty. They alleviate the burden of "complex work," enabling agents to take on challenging tasks without exerting more effort. Further, they improve ramp time and development, surfacing more personalized training modules while reducing the need for traditional "classroom learning", shadowing, and nesting time (since critical knowledge will be available via agent assist).

Analyze: Uncover Opportunities For Continuous CX Improvement

With the stakes of the customer experience rising, there is no room for random chance. By harnessing AI-powered analytics, contact centers eliminate that guesswork – and position themselves for exceptional service delivery in the short-term and continuous improvement in the long run.

Modern conversation intelligence solutions capture actionable insights from 100% of interactions, uncovering customer intentions, sentiments, and fail points within and between all channels. This enables businesses to successfully orchestrate journeys, while predicting likely behavior and adapting workflows.

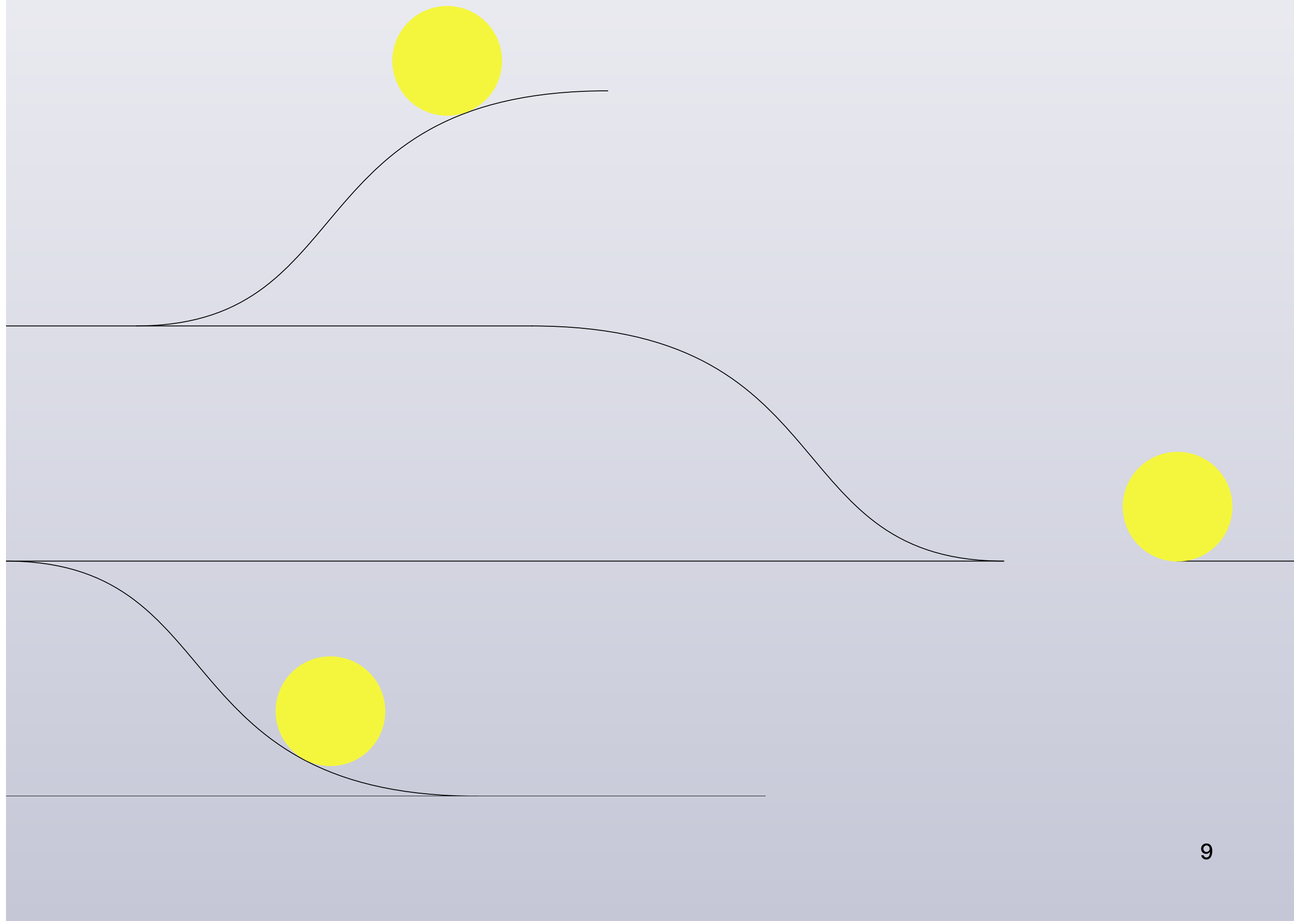
AI-powered data, moreover, leads to better AI-powered engagement. As brands learn exactly how automated interactions are faring with customers, they can reposition bots and self-service tools throughout the journey, while also uncovering critical opportunities for enhancing and retraining their models.

Conversation intelligence also helps assess the agent experience, revealing the impact of evolving workflows on agent sentiment and skill development. With this information at hand, leaders can successfully tailor coaching, culture, and wellness efforts to the realities of their contact center environment.

This dynamic view into agent performance also allows for next-generation quality management, ensuring accurate, consistent, and compliant communication even as interactions become less predictable and “scripted.”

The Upside

AI-powered intelligence helps to simplify and demystify an increasingly nebulous customer engagement landscape. It empowers contact centers to design more customer-centric journeys, provide a more empowering agent experience, and elevate operational performance.



Observe VoiceAI Agents: Bringing The 3A Framework To Fruition

The AI transformation is not a singular, one-dimensional process. It requires embracing a new mindset, rethinking workflows, reassessing performance objectives, and deploying a variety of solutions across all corners of the operation.

Some initiatives do, however, play a critical role in the process. Deploying voice AI technology is high on the list.

From the customer's perspective, voice AI directly addresses the biggest hesitations and reservations about the rise of self-service.

It fits seamlessly into the phone experience, thus bringing the efficiency of automation to the channel customers most trust. It mirrors traditional human conversations, empowering customers to articulate their issue without having to navigate confusing or unintuitive menus. It captures – and can even adapt to – actual customer context and sentiment, providing a valuable level of humanity in an increasingly robotic world. It integrates with existing omnichannel journeys and platforms, eliminating the repetitive questions and friction that have become the unfortunate norm in the modern contact landscape.

Granted, not all voice AI solutions deliver the same outcomes. If the AI model is inadequate, if the data capture is insufficient, and if the experience is uninviting, it will come across as yet another exercise in customer deflection rather than empowerment.

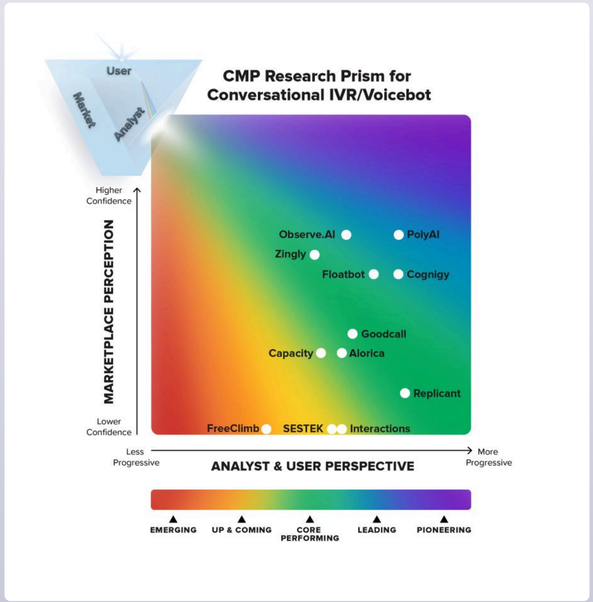
Signposted by its "Leading" status in the CMP Research Prism for Conversational IVR/Voicebot, Observe's VoiceAI Agents solution directly addresses these critical considerations. The immensely intuitive platform facilitates an outside-in approach to experience design, enabling non-technical resources to devise and deploy voicebots based on findings from prior customer interactions.

Supporting robust customizations for voice, sentiment, topic preferences, and escalation protocol, these AI Agents provide a richly conversational self-service experience while also facilitating a smoother overall journey. Customers will never feel like they have to choose between the instant accessibility of AI or the quality of agent support; instead, they will see the voice AI agent as a valuable pathway to the outcome they are seeking.

Along with capturing the customer data needed for smooth handoffs, Observe's VoiceAI Agents provide comprehensive performance analytics. This enables brands to evaluate (Auto QA) their self-service instances, while making continuous improvements to elevate the support and escalation experiences.

Inviting from a user experience standpoint, the solution is underpinned by powerful large language models, generative, and agentic AI – all developed by a longtime authority on the matter. Observe's more than 350 experts are not simply well-versed on technology but on the application of that technology to customer and employee experiences.

It is that customer-centric mindset that explains the solution's multilingual support and out-of-the-box integration with leading CRM and CCaaS solutions. The goal is to bring the benefits of AI, not just the theoretical promise, to customers, agents, supervisors, and strategic leaders around the world.



Roadmap to ROI: Making AI Transformation A Reality

In recapping the urgent need, detailing a strategic framework, and highlighting a powerful technology, the previous sections provide fuel for your AI transformation.

But where do you go from here? What can you do to motion toward the 3A Framework? What results should you expect?

To empower a more personalized journey to customer service excellence, this report concludes with a roadmap to ROI. It reveals how organizations of different maturities can unlock the benefits of AI, including voice AI technology, before providing a means of calculating potential profit gains.

Layer	Maturity	Focus Area	Outcome
Automate	Early Stage	40% of repeatable, rules-based conversations	Cost reduction, Faster resolution, Optimized workflow management
	Intermediate Stage	Early stage focus plus rules-based proactive alerts, customer feedback requests	Increased action rate for appointments, Improved sales and marketing conversions
	Mature Stage	Early and intermediate stage focuses plus recurring make-good / exception inquiries	Greater customer satisfaction and advocacy, Improved customer lifetime value
Assist	Early Stage	In-conversation support for 60% of live conversations, Call summarization	More relevant conversations, Reduced agent effort and frustration, Reduced handle time, Easier follow-up conversations
	Intermediate Stage	Early stage focus plus pre- and post-call actions, sentiment coaching, supervisor takeover alerts	More personalized conversations, Improved de-escalation and winbacks, Smoother transfers and handovers, Better customer feedback collection
	Mature Stage	Early and intermediate stage focuses plus next-best recommendations for cross-sells, up-sells	Greater revenue and agent buy-in
Analyze	Early Stage	Insights from 100% of conversations	Improved journey orchestration and design, Better agent coaching and development
	Intermediate Stage	Early stage focus plus insight into journey friction, personalized quality management and coaching insights	Risk-free support for agent autonomy, More individualized performance development to increase intelligent routing options
	Mature Stage	Early and intermediate stage focus plus predictive insight into customer action and churn risks	Complete product and service redesign, Stronger business forecasting, Greater lifetime value

AI Focus	Existing Cost	Savings
Repeatable conversations	__ for agent-supported calls	(__ *.40) - AI Agents deployment cost
Agent Effort	X= % of time spent on “non-support” work Y= % of time spent searching through knowledge base Z = % of time spent authenticating and clarifying customer data ZZ = Total Agent Spend	(ZZ(X+Y+Z))-AI Agents deployment cost after deducting for above
Customer Feedback	X= cost for existing survey strategies	X-AI Agents deployment cost after deducting for above
Proactive Outreach	X = missed appointment / rescheduling cost Y = cost to re-engage buyers	Early stage focus plus insight into journey friction, personalized quality management and coaching insights (X+Y) - AI agents deployment cost after deducting for above

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