

Omnichannel AI Agents

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Introduction

They may be loud, but the calls to “be where your customers are” and embrace the omnichannel revolution are going unanswered. Many businesses continue to deliver restrictive, impositional experiences that negate any illusion of customer empowerment.

Just 22% of consumers say they choose where their typical customer service interactions take place. More alarmingly, the overwhelming majority endure considerable friction and inconsistency as they move between channels.

The issue is not one of philosophical rejection. Businesses value the idea of meeting customers on their preferred terms, and they want to unify their touch points into a cohesive journey. Unfortunately, they face far too many operational hurdles. From fragmented systems, to inconsistent data, to limited resources, they are simply unable to make “omnichannel” a reality.

What can they do to finally overcome these challenges and deliver consistent, connected experiences?

In theory, AI represents the answer. By automating inefficient tasks, augmenting human performance, and uncovering actionable intelligence at scale, AI should make service better and more accessible. It should enable brands to deliver exceptional experiences to a greater number of customers, across a greater number of channels.

In practice, many AI investments have been exacerbating the problem. Today’s AI self-service experiences tend to be impersonal, non-conversational, and fragmented from the rest of the customer service ecosystem. After navigating these frustrating, inconvenient, unintuitive platforms, customers are often forced to choose between accepting a generic resolution – or waiting on hold for a live agent who will ask them to repeat everything they have already shared.

Nothing about that experience is empowering. Nothing about that experience is customer-centric. Nothing about that experience is omnichannel.

But AI-powered experiences do not have to be like this. Modern AI agents are capable of seamlessly integrating into an omnichannel journey, eliminating numerous sources of inefficiency, and working collaboratively with human employees to deliver consistently stellar, contextually relevant service.

This special report details the rise of the omnichannel AI agent – and how you can harness the benefits in your own organization.



Framework for AI Adoption: 3

Principles for Building Customer Trust

Omnichannel AI agents are capable of supporting customers and employees across every phase of the journey. They represent an opportunity to make service more convenient, more personalized, and more accessible at every touch point.

Brands cannot seize this opportunity, however, if their customers are unwilling to adopt, let alone trust, AI-powered service. Presently, this resistance is a real concern: only 29% of consumers believe AI is adding value to the customer experience, and many continue to seek live agent support for even the most simple, transactional matters.

By ensuring your AI agents adhere to the following three principles, you can overcome this resistance and open the door to lasting customer trust.

The experience must be conversational

When it comes to satisfying customers, effort is the enemy of excellence. Unfortunately, today's AI-powered chatbots and IVRs are synonymous with significant effort.

According to CCW Digital's 2025 Consumer Preferences Survey, "difficulty explaining their issue" is the #1 reason customers bypass self-service in favor of agent assistance.

Whether navigating confusing menus or struggling to articulate their issue in a way the AI platform can understand, today's customers cannot easily communicate their issue, sentiment, and/or desired resolution. Rather than subjecting themselves to further frustration, they demand escalation to a live agent.

This produces a lose-lose-lose situation. Customers lose the option to conveniently solve problems on their own terms, agents lose the ability to pivot from "simple issues" to more complex work, and businesses lose the actionable intelligence – and handoff context – that would come from conversational self-service interactions.

If brands want to increase self-service adoption in any channel, they must ensure the AI agent supports a conversational experience in the customer's preferred language and natural communication style. It must allow customers to communicate in their own words and be capable of delivering responses that are clear, relevant, and valuable.

Escalation must be seamless

Customers absolutely value their own time and convenience. They are not clamoring to wait on hold for the chance to speak to a live agent and would actually relish the opportunity to solve problems on their own terms.

The problem is that self-service experiences have historically been especially inconvenient. After navigating the unintuitive platform, customers would either reach a dead end – or deal with a cumbersome escalation that required undue waiting and repetition. Instead of subjecting themselves to that inefficiency, many choose to simply bypass the self-service fantasy and directly pursue agent assistance.

"When I need help, I shouldn't be stuck. No channel should be a dead end. Customers must be able to escalate smoothly—whether that's moving from chat to a callback, an intelligent handoff, or a direct transfer to voice—so issues get resolved without friction."

- John McMullan, [Observe.AI](#)

By eliminating this fear of inefficiency, brands can overcome the stigma surrounding self-service and increase customer adoption. [Assurance of easy access to a live agent is, in fact, the #1 way to get customers to try a self-service platform.](#)

Customer-centric AI agents, therefore, must not only provide an instant way to request agent support, but capture, analyze, and summarize the context said agent would need to seamlessly continue the conversation. This ensures that every bit of the customer's effort will bring them closer to a resolution and thus eliminates any illusion that "waiting on hold for a live agent" could somehow be the faster, more efficient option.

Service outcomes must be valuable

By the time they engage with an AI or human agent, the majority of consumers have already tried passive self-service options. They have already run web searches, read troubleshooting instructions, and navigated through FAQ pages. They have already reviewed – and rejected – the standard "policy" answer to their question.

Whether it was because they did not understand it, did not feel it applied to their unique situation, did not think it wholly addressed their need, or did not believe it reflected the appropriate level of remorse, they decided it was inadequate. They decided to seek additional, conversational, personalized assistance.

Therefore, they are not looking for AI agents to simply regurgitate generic policy, thank them for their feedback, or advise them to start from scratch in a live agent channel. They want actual service with tangible results.

Obviously, this does not mean every business should empower its AI agents to provide customized resolutions to every conceivable situation. But it does mean that they should be transparent with customers about what issues and transactions their AI agents can handle – and then get comfortable letting the AI agents actually take the requisite actions.

And if the desired action falls outside a realistic comfort zone, the AI agent will ideally handle at least some of the process so that a human agent can contribute quickly, accurately, and completely.

“There's understandable hesitation around giving AI full autonomy, but the reality is that millions of interactions every day are already being handled successfully. The key is picking use cases that make sense: routine, repeatable questions like flight changes or account updates are often better served by AI than by making someone wait on hold for 45 minutes.”

- John McMullan, [Observe.AI](#)

Making AI an *Omnichannel* Revolution:

4 Steps to Success

AI agents that support natural conversation, foster seamless escalations to human employees, and take real action are theoretically capable of winning customer trust.

Practical success hinges on building the ideal omnichannel framework, deploying AI agents strategically within that journey, astutely assessing their impact on customer outcomes, and then leveraging them as a vehicle for continuous improvement.

The nuances of these four steps to success follow.

Design your channel ecosystem from the customer's perspective

When it comes to the omnichannel ecosystem, the “omni” prefix does not have to be taken literally. It is not an imperative to engage with customers in every conceivable channel. It is certainly not a call to deliver a precisely identical experience in each of those channels.

“There’s a common misconception that omnichannel means offering the exact same service capabilities on every channel. In reality, it should mean building a strategy that matches the customer’s need with the right channel at the right time. Designing this kind of journey starts with evaluating which channels you want to support, what types of queries naturally happen there, and how you’ll handle or redirect them.”

- John McMullan, Observe.AI

Ideally, customer service leaders will design this channel ecosystem from the outside-in. They will consider which channels their customers actually want to use for specific issues, how they specifically want to engage within those channels, and what they expect the escalation process to entail.

“The best way to deploy AI agents in an omnichannel ecosystem is to start with the customer journey, not the technology. You need to know where customers are likely to ask different types of questions and decide which channels are best suited to handle them. From there, AI agents should be built to fit the strategy you’ve set for each channel, rather than trying to apply the same automation everywhere.”

- John McMullan, Observe.AI

By reconciling the customer perspective with their own insights about which channels work best for which issue, businesses can design efficient journeys, deploy channel-conscious AI agents for the most logical use cases, and educate customers on how best to navigate their channel ecosystem.

The outcome will be an element of transparency, in which customers know where to go for which issue – and where they will go if additional assistance is required. It will also be one of unity and consistency; instead of treating them as disparate touch points, brands can leverage their various channels as a harmonious collective for delivering the strongest possible experience.



Rather than perceiving channels as isolated destinations with their limitations and trade-offs, customers will embrace them as entry points to a seamlessly connected journey. They will see channels – and agents within those channels – working together to reduce effort, increase personalization, and generate value.

“A good example is account updates: if a request comes through a web chat, you might direct the user to log in for security reasons. If additional authentication is required, you could escalate to a voice call or schedule a callback—potentially led by an AI agent that maintains context while protecting sensitive data.”

- John McMullan, Observe.AI

Although this omnichannel mindset is critical, success also hinges on an omnichannel operational framework. Channels, systems, and databases must be connected, ensuring customers can move freely between touch points – and that AI agents have constant access to critical context and intelligence.

“AI agents need to tie into your CRM or system of record so every engagement, no matter where it starts, is visible and connected. On top of that, you need the ability to monitor quality and refine agents continuously as you see new patterns or edge cases emerge.”

- John McMullan, Observe.AI

Business units must also be aligned, ensuring that different channels do not sit with different teams who have their own objectives.

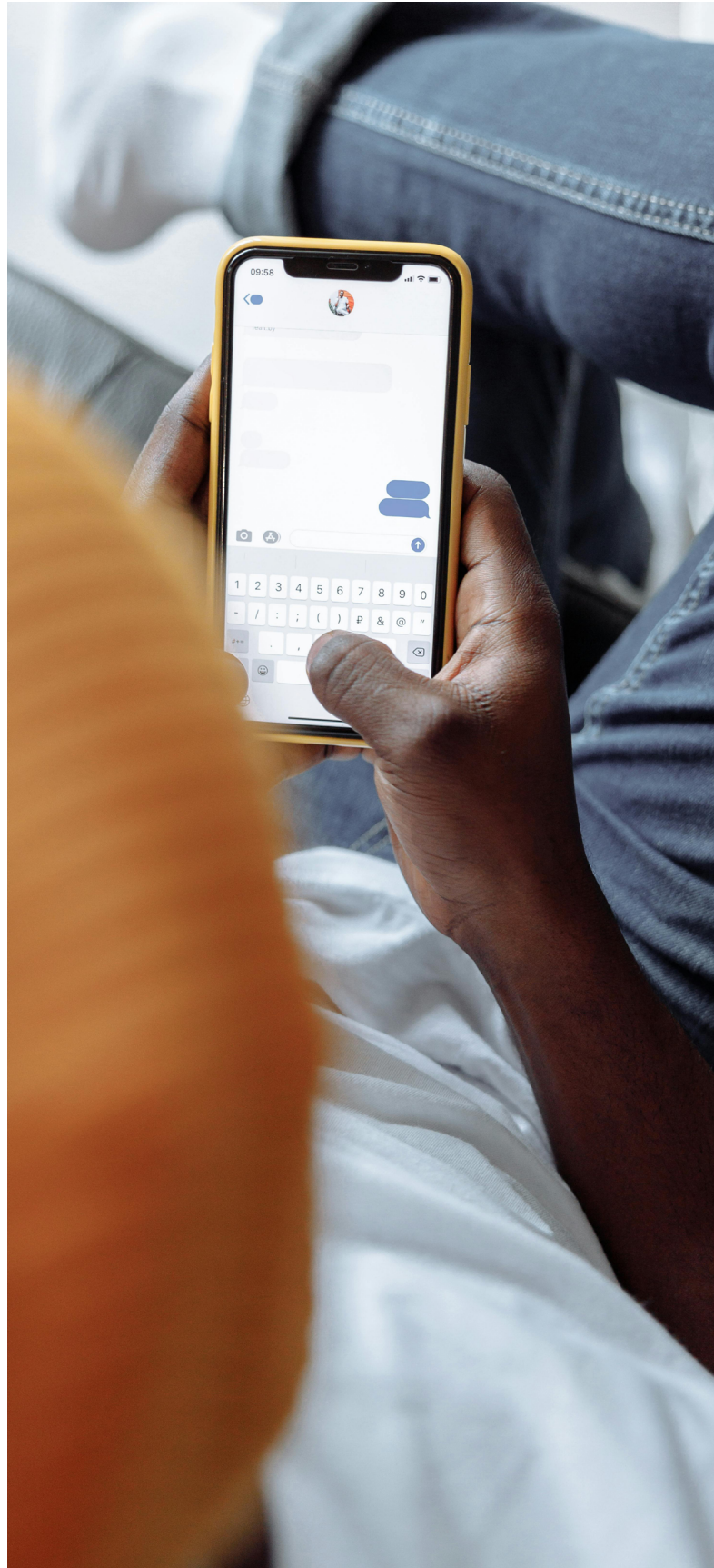
“Many organizations have chat under digital, sales under marketing, and voice under the contact center. Bringing those stakeholders together and aligning on who owns what is the first step toward a connected strategy.”

- John McMullan, Observe.AI

Optimize the collaboration between AI and human agents

A customer-centric approach to AI requires more than a connected channel framework. It also requires meaningful synergy between AI and human agents.

As with the channel ecosystem, successful organizations will take an outside-in approach to designing this collaboration. Rather than identifying automation-friendly tasks solely based on internal opinions or even volume, they will let the voice and behavior of their customers dictate the opportunities.



“You need to look at the root causes behind interactions: which are routine and repetitive, which require human judgment, and where an AI agent can handle the front end before handing off to a person. It’s a combination of containment opportunities (e.g., password resets, FAQs, scheduling) and assistive tasks that free up humans to spend more time on complex or revenue-driving conversations. Over time, you should plan for agents to expand into new use cases as the models mature and your team gains confidence.”

- John McMullan, Observe.AI

Granted, an inside-out approach may be obligatory in some cases. If operational realities, cost considerations, and compliance concerns make it overly risky – if not impossible – to use AI agents for certain issues, organizations may have to route customers to human employees.

Fortunately, they can still optimize this routing by using AI in a supportive role.

“There are certain use cases—fraud detection, medical guidance, financial trades—where you always want a human in the loop. That doesn’t make the AI agent irrelevant; it can still handle the initial engagement, authenticate the customer, and capture intent before transferring to a person.”

- John McMullan, Observe.AI

All use cases, moreover, benefit from clear rules and guardrails. Even theoretically simple, repetitive issues can become inefficient or risky if they move in unexpected directions, and the right AI agent will recognize this situation – and escalate accordingly.

“If a request falls outside their training or knowledge depth, the agent shouldn’t guess—it should follow predefined rules to either redirect or hand off seamlessly. This both prevents hallucination and ensures the customer gets to the right resource without friction.”

- John McMullan, Observe.AI

In all situations, the key is to be transparent with customers about the AI agent's capabilities, open about when a human needs to get involved, and productive in passing relevant summaries, personal data, and context to the receiving employee. This will simultaneously boost confidence in the AI touch point and enable agents to quickly provide the more unique, personalized, "above and beyond" experience unavailable in self-service.

"Observe's omnichannel AI agents are built with this in mind. They integrate directly into contact center and chat systems, making it possible to route calls, chats, or messages to the right human agent while maintaining full context. We work closely with program leaders to design these escalation paths upfront, ensuring that when a handoff happens—whether by business rule or knowledge gap—it feels like a continuation of the conversation, not a restart."

- John McMullan, Observe.AI

Establish the right metrics and vision for success

The omnichannel revolution is not about expanding channels for channels' sake. It is about leveraging channels to create a more valuable experience for customers.

The same is true of deploying AI agents within the omnichannel ecosystem. It is not about chasing AI because it is a trend; it is about using the technology to reduce inefficiencies, unlock human ingenuity, and ultimately elevate every phase of the journey.

To hold omnichannel AI investments accountable for

customer centricity, it is imperative to select the right metrics.

The right metrics will stem from two critical ROI lenses. First, AI-powered experiences need to be effective. If they require too much effort, deliver inadequate service outcomes, or fail to increase customer adoption and containment, they become expensive distractions rather than valuable vehicles for empowerment. Customers will end up getting more frustrated, and internal workflows will remain inefficient.

Further, the introduction of AI agents should lead to better overall experience quality. The goal should not be for customers to passively tolerate AI for issues they previously addressed with human agents; it should be to leverage a combination of AI and humans to create more value and greater customer happiness. Transactional matters should be easier and faster to address, and complex interactions should demonstrate more empathy, personalization, and commitment to lasting satisfaction.

Ideally, the introduction of AI agents will also uncover context that businesses and their employees can use to improve marketing, strengthen upsells, and grow lifetime value.

Prioritize continuous intelligence – and improvement

Unlike traditional self-service options, modern AI agents are conversational, omnichannel, and adaptive.

Helpful in creating more engaging, robust experiences for customers, these capabilities also make AI agents powerful vehicles for listening, learning, and growing.

Since they let customers engage in natural language across different touch points, they uncover actionable intelligence about how customers prefer to engage, how they frame their issues, and how they react to certain policies and resolutions. Fuel for training the bot to improve its performance, behavior, and personalized content delivery, this insight can also drive wholesale improvement for the customer service operation.

Brands will learn how to design better products, orchestrate better journeys, anticipate escalations (and train agents accordingly), reframe scripts and knowledge content, and spur lucrative customer actions related to posting reviews, renewing services, and purchasing upgrades.

“What sets Observe apart is our ability to truly understand and operationalize human-to-human conversations. We analyze calls at scale, looking not just at words but at sentiment, intent, outcomes, and call flows. That insight guides the entire lifecycle: identifying the best use cases for automation, refining agents with simulation and testing before deployment, and continuously improving performance through human-in-the-loop feedback and auto-QA.”

- John McMullan, Observe.AI

Along with building intelligence capabilities into their AI solutions, leading providers like Observe mitigate any risks associated with this data. Most notably, they resoundingly commit to protecting privacy, security, and compliance.

“And because trust and security are non-negotiable, we embed strict guardrails, audit trails, and compliance frameworks into the platform. That way, brands can both unlock intelligence for growth and protect sensitive customer data at the same time.”

- John McMullan, Observe.AI




Considering the fact that 89% of leaders aim to exceed customer expectations on privacy and security – making it a higher “above and beyond” priority than speed, personalization, and empathy – this technology is a gamechanger for those investing in the omnichannel AI revolution.

Omnichannel AI in Practice: Real Stories of Success

Success step #3 underscores the importance of measurement. It is not enough to have the mindset or pursue exciting technology; both must come together to produce real ROI.

For many, “real ROI” has been the elusive part of the equation.

For Observe clients, however, it is a commonality. Leading, cross-industry companies have leveraged Observe’s AI agents to make demonstrable gains in efficiency, customer satisfaction, and overall business success. Examples follow.

	Accolade handles 10,000+ calls daily to resolve common queries, such as ID card replacement, or collects intents and routes to the right human expert for healthcare navigation support. This has reduced 20% from average handle time.
	Affordable Care is launching a ChatAI Agents to supplement their VoiceAI agent, provide an omnichannel experience for helping patients find clinics or schedule appointments, and follow treatment plans post visit.
	SimpleOnline Healthcare has deployed VoiceAI (and soon ChatAI) agents to support their network of patients with purchasing, onboarding, and adherence for new medications. They are currently focused in the UK but planning to grow to 8+ more countries shortly, and will be able to handle mutli-language requests with a single AI Agent.

About the Author



Brian Cantor is the Managing Director of Customer Management Practice's Digital division. Driven by a passion for helping brands better empower their employees and more meaningfully connect with customers, Brian oversees research, product development, editorial vision, and commercial strategy for properties like CCW Digital and Customer Engagement Insider. Reaching a community of almost 200,000, these digital properties offer industry-leading commentary, research reports, and virtual event sessions.

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