

Find Your First AI Use Case

Start small. Build smart. Use this worksheet to spot where AI can make an immediate impact without overhauling your systems.



What Are You Trying to Solve?

Check the boxes that describe your team's current contact center challenges. These are often good places to start with AI.

- ☐ Long handle times or repeated calls
- ☐ Manual note-taking or QA is slow
- ☐ Customers get transferred or bounced
- ☐ Agents are overloaded with simple requests
- ☐ Agents switch between too many systems
- ☐ No visibility into prior interactions or context

Evaluate AI Fit

Review these common areas in your contact center and mark where AI could realistically help.

Area	Common Problem	Could AI Help?
Agent Assist	Agents repeat answers	☐ Yes ☐ No
Real-Time Transcription	Manual notes, QA takes too long	☐ Yes ☐ No
Smart Routing	Customers are routed incorrectly or repeat info	☐ Yes ☐ No
Knowledge Suggestions	Agents search too long for answers	☐ Yes ☐ No
Auto-Summaries	Call notes are missing or inconsistent	☐ Yes ☐ No
Sentiment Detection	No visibility into caller tone	☐ Yes ☐ No

Not sure where to start? Let's talk through your use case.

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