

BALANCING AI + HUMAN AGENTS IN YOUR CONTACT CENTER

A quick-start guide for CX leaders

1

DEFINE THE ROLE OF AI & HUMANS

- ☐ Identify routine tasks AI can own (billing, authentication, FAQs).
- ☐ Map out complex or emotional cases where humans add value.
- ☐ Set up escalation paths so customers never get “stuck” in automation.

3

EMPOWER YOUR AGENTS

- ☐ Train agents on empathy, negotiation, and active listening.
- ☐ Provide AI literacy training so they trust and use the tools.
- ☐ Reframe their role as “advisors” handling the moments that matter.

5

KEEP IMPROVING

- ☐ Collect frontline feedback monthly to spot pain points.
- ☐ Adjust AI workflows as customer needs evolve.
- ☐ Treat AI adoption as ongoing—not a one-time project.

2

PILOT BEFORE SCALING

- ☐ Choose one AI use case (like authentication to test AI).
- ☐ Track early results: CSAT, containment rate, agent feedback.
- ☐ Scale only after clear ROI and customer approval.

4

MANAGE CHANGE PROACTIVELY

- ☐ Communicate openly: AI reduces repetitive tasks, not jobs.
- ☐ Share early wins (shorter wait times, reduced After Call Work).
- ☐ Involve agents in testing and refining AI features.

This quick guide is all about action, but some topics deserve a closer look:

- **AI as a Copilot:** AI can assist agents with real-time coaching, call summaries, and sentiment analysis, enhancing issue resolution.
- **Change Management Matters:** Involving agents early in AI testing and decision-making fosters ownership and reduces resistance.
- **The Human Advantage:** Combining AI's efficiency with human empathy, creativity, and problem-solving maximizes effectiveness.
- **Metrics Beyond Efficiency:** Focus on long-term success by measuring customer loyalty, employee satisfaction, and business growth, not just speed and cost savings.

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