interactions

9 Expert Insights on AI and Customer Experience

How to build easeful, proactive service with today's AI technologies

As AI advancements stack up with relentless speed, contact centers are well positioned to move beyond basic automation to better serve customers with memorably effortless interactions and to make unprecedented efficiency gains. With so much happening — and so much at stake — we wanted to understand and share how customer service leaders can best leverage conversational AI and contact center automation.

In this pursuit, the experts at Interactions engaged in conversations hosted by AI research firm Emerj with business leaders in retail, financial services, insurance, healthcare, and technology to share ideas, experiences, and thoughtful prognostications.

For this ebook, we've curated 9 key insights for companies at all stages of AI evolution in customer experience (CX): those who need to conquer today's challenges, those who want to transform good CX into great, and those who are looking to the horizon for the next AI advances.

Read on to learn how you can use conversational AI and automation to provide easy, proactive service that builds trust and loyalty, while improving contact center operations, costs, and agent engagement.

Conquering
Today's Challenges

1. Strengthen customer loyalty with personalized, proactive customer service experiences.

In most industries (with the exception of some insurance and utilities), consumers can switch brands with relative ease when customer service disappoints them. If companies don't prioritize low-effort, interconnected customer experiences, they risk damaging loyalty and losing market share. Yet building such journeys can be challenging, especially for companies with complex siloed systems.

The key to connecting disjointed experiences for easier, personalized issue resolution is AI that seamlessly integrates with common contact center platforms, CRM, ticketing, call management systems (CMS), payment, appointment, and other relevant systems. Well-integrated AI tools can, for example, ease authentication or speed intent recognition, such as asking about an upcoming appointment or bill due date. They can proactively address potential issues, such as a delayed prescription refill or a utility outage in the customer's area, or provide tailored upsell suggestions.

These aren't just conveniences; they're powerful ways to show customers you value their time and understand their specific needs. Personalization also offers big business benefits, including improved routing accuracy, higher containment, targeted sales opportunities, and increased contact center scalability.

THE GOAL:
Leverage conversational AI to personalize interactions, build lasting loyalty, boost sales, and ensure every customer experience feels both effortless and valuable.

Providing context for tailored offers ensures customers feel confident that their data is being used responsibly and meaningfully.

Phil Gray,
Chief Product Officer, Interactions

2. Ease customer effort and frustration by building in AI and automation fail-safes.

Customer service systems often fail when they demand excessive effort from users. Narrowly focusing on containment by forcing customers to stay in loops of repeated information requests will only inspire frustration, not loyalty.

Our experts advise prioritizing the "speed of failure" in self-service. When automated tools can't resolve an issue — whether due to complexity, a lack of intent automation, or a low threshold of understanding — the system should quickly recognize this limitation and either use human-in-the-loop technology to keep the interaction moving or advance the customer to a live agent.

Even when a call or chat cannot be contained, AI can still help save time and effort through partial automation. First, AI can authenticate identity and capture intent, passing that information along to the agent. On a longer scale, the business can analyze the failure points to fuel machine learning and optimize the system in the future.

THE GOAL:
Measure and minimize the time it takes for automated systems to recognize failure and redirect customers to live agents with a warm handoff, ensuring a seamless and authentic customer experience.
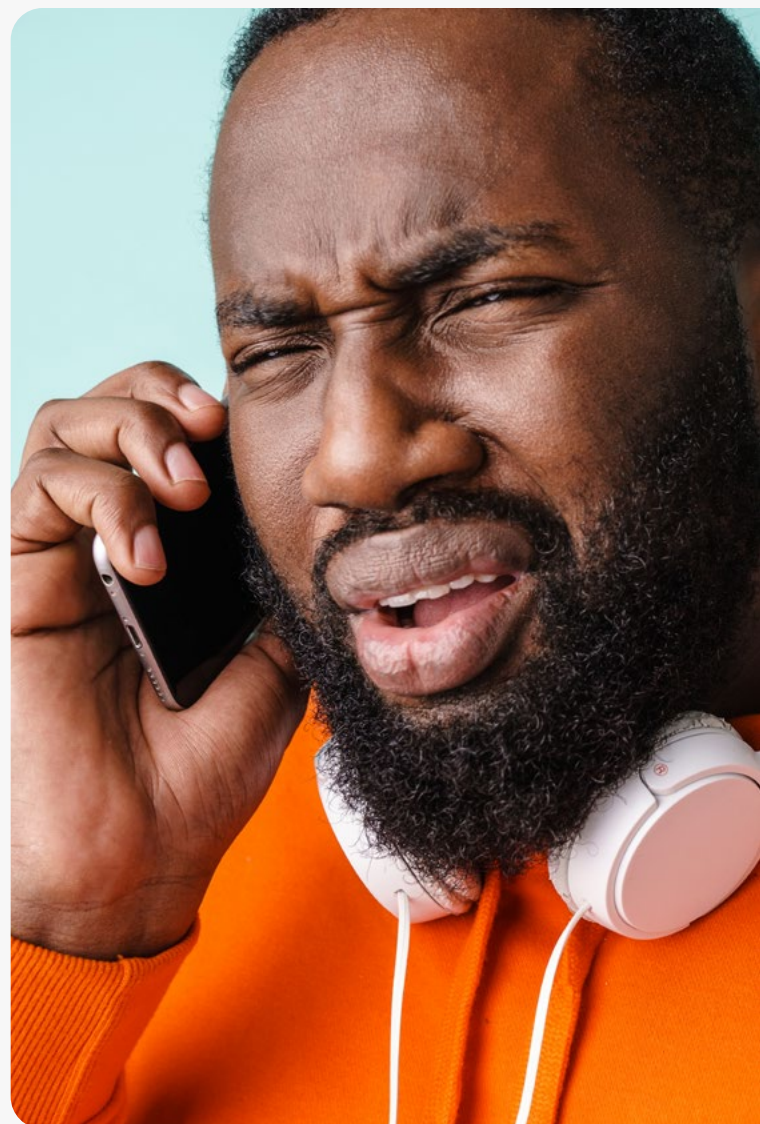
Customers don't care if it's a bot or a human; they just want their problem solved quickly and efficiently.

Robert Rose
Senior AI Strategist, Adobe

3. Get more long-term value from AI by looking beyond flashy features.
Stability, redundancy, and compliance have become table stakes for any enterprise-grade technology platform, AI or otherwise. Yet, administrative ease and actionable reporting are often overlooked. Many conversational AI platforms release flashy features but neglect these fundamentals, which can significantly impact ROI and successful adoption.

Consider this analogy: While Linux is a more robust operating system, it hasn't attained the reach of Microsoft Windows, due to its complexity. Similarly, a conversational AI system should be user-friendly, easy to learn and manage, and provide intuitive, actionable reporting that your leaders can use to make better decisions and to improve results. It should also help scale repetitive analytical tasks, such as analyzing call logs or monitoring customer sentiment, so that you can handle large volumes of customer interactions more efficiently.

Similarly critical is ongoing support. AI is never set and done. Conversational AI platforms must keep up with evolving business and customer needs. Look for a platform that offers a consultative team approach, where experts by your side engage in regular discussions with key team members, call listening, and deep data dives that inform optimization projects, such as automating more intents, improving AI comprehension, or meeting new regulatory requirements.

THE GOAL:
Adopt a user-friendly conversational AI platform that prioritizes continual improvement and intelligent, accessible analytics.

Moving from Good to Great

4. Enhance customer experience with AI-assisted wait times

When customers are on hold to reach a live agent, that "dead time" can be leveraged for low-effort transactional tasks to better serve customers and to speed up the eventual live interaction.

For example, global health and wellness company Herbalife, which services both customers and distributors, engages callers during hold times with AI tools to address simple queries while ensuring customers retain their place in line for live agents. The AI can address simple queries like account balances or shipment tracking, reducing the subsequent call's length and allowing live agents to focus on more complex issues, improving overall efficiency. This AI interaction also helps make wait times feel shorter.

THE GOAL:
Find every opportunity to optimize the time that customers spend with you to increase ease and efficiency.

Human-in-the-loop workflows allow AI to complement human expertise rather than replace it, creating a seamless support system that adapts to complex customer needs.

Phil Gray,
Chief Product Officer, Interactions

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5. Build better-performing AI with human-in-the-loop (HITL) strategies

Even with the most advanced natural language understanding and processing, conversational AI can hit a wall. Customers may have background noise or a poor connection, state their intents with uncommon phrasing, or request a function that requires human oversight due to business rules.

Combining AI automation with real-time human oversight — an approach called "human-in-the-loop" (HITL) — helps resolve low-confidence utterances and edge cases, ensure accuracy, and contain and ease situations that require human intervention. HITL workflows ensure that AI operates as an assistive tool, with humans stepping in seamlessly and invisibly when the system needs help.

Each time an utterance is passed to a human agent in the background to move the interaction forward, the correct intent along with the utterance (with PII removed) can be fed back into the AI to improve performance over time. This hybrid approach addresses a key pain point in customer service: the frustration of navigating ineffective bots. It also enables conversational AI systems to hit the ground running with higher accuracy from day one.

THE GOAL:
By integrating human expertise, companies can ensure their AI systems perform with more human-like accuracy and ease, ultimately fostering trust and enhancing user satisfaction.
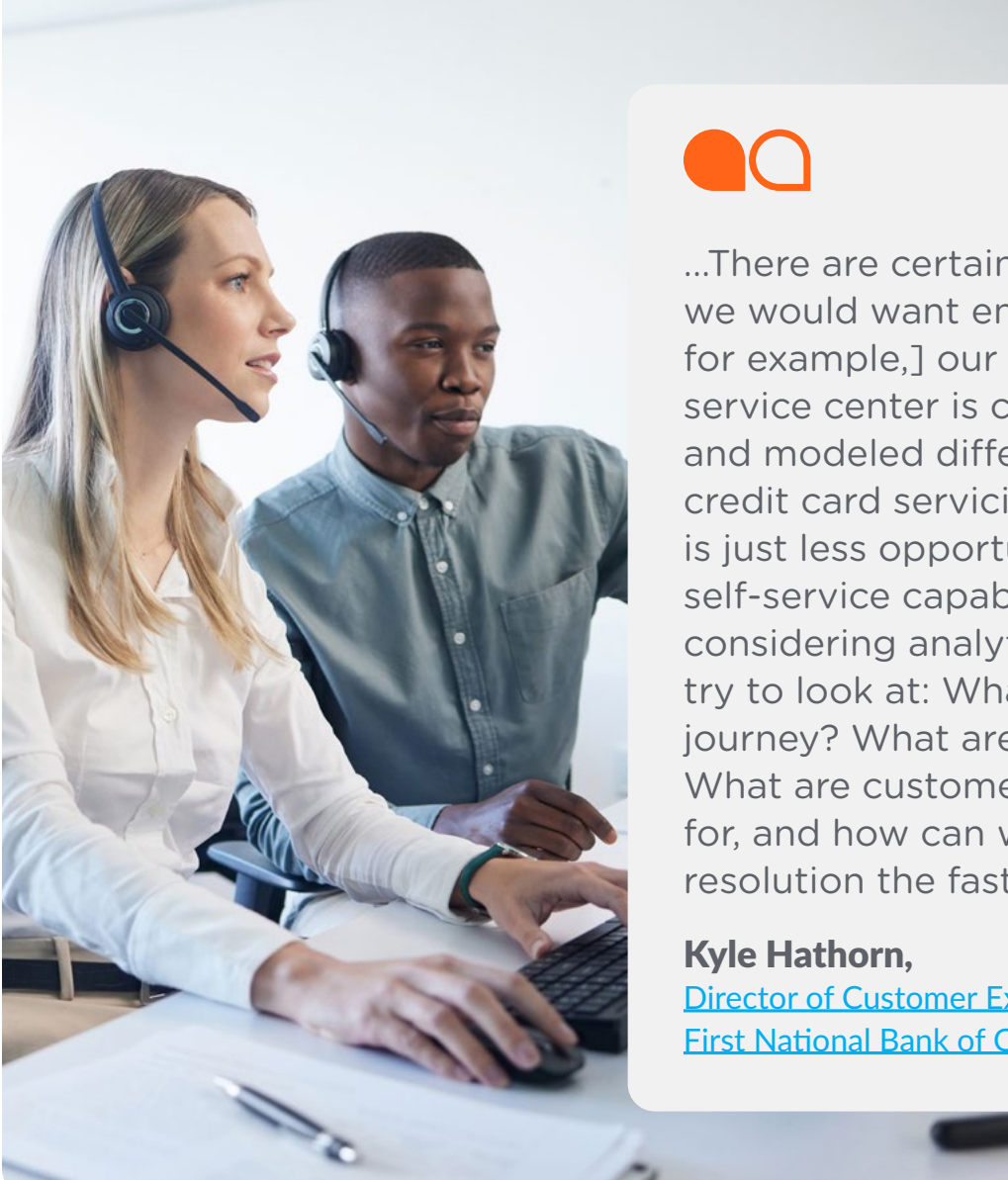
...There are certain aspects where we would want enhancements. [But, for example,] our corporate treasury service center is completely staffed and modeled differently than our credit card servicing center, and it is just less opportunity to do that self-service capability. [So when considering analytics,] we always try to look at: What is a customer journey? What are the true end goals? What are customers contacting us for, and how can we get them to that resolution the fastest for their benefit?

Kyle Hathorn,
Director of Customer Experience and Strategy, First National Bank of Omaha

6. Elevate analytics by focusing on what actually matters to customers

Contact centers have long held certain metrics as the gold standard, such as average handle time, containment, and hold times. However, these KPIs can mask loyalty-damaging problems in the contact center, such as customers who hang up but are considered "contained" in data analysis.

Our experts instead advocate for a customer-first mindset. By leveraging AI-driven insights, companies can prioritize metrics that elevate overall satisfaction, such as customer effort score (CES), sentiment, and successful self-service. These align with what customers value: positive, practical experiences, not just speed of resolution. At the same time, the improvements you deliver to customers based on these metrics can also positively affect operational efficiency.

Furthermore, granular data analysis is crucial. Instead of treating all calls the same, differentiating between structured, transactional calls (e.g., balance transfers) and complex issues (e.g., fraud) allows for more proactive analytics. This approach, which may also involve analyzing different functions separately, can help you consistently improve both customer outcomes and contact center performance

THE GOAL:
Connect customer-focused metrics with operational goals to improve loyalty and make the contact center work better for everyone.

Keeping an Eye on the Horizon

7. Measure ease and satisfaction in every interaction with agentic AI

In the last section, we mentioned the importance of customer effort scores. However, low response rates and delayed feedback can limit the usefulness of traditional customer satisfaction surveys, like NPS or CSAT. This is another area where AI can shine: predictive AI capabilities deployed with agentic AI workflows enable businesses to continuously measure every single interaction at scale.

With the ability to analyze what went right and wrong across every interaction at scale, your organization can more easily identify and address friction points throughout the customer journey. These centralized insights can help reduce siloed insights, lower operational costs, and help you adapt quickly to changing customer needs.

THE GOAL:
Enabling more robust AI-fueled analytics, rather than relying on voluntary customer surveys, to scale CX analytics, streamline issue resolution, reduce frustration, and create a more seamless overall experience.

The only way to really get [effort scores] until now was through a survey, but now we're using AI models to actually predict what the customer would have scored had they done the survey.

Brett Kiley
Executive Director of Customer Experience and Insights, CVS Health

8. Build internal trust and adoption in AI.

AI programs of any type require change management, in two seemingly polar opposite ways. Some employees may misinterpret AI's "confidently wrong" outputs as infallible, leading to the spread of false information and distrust when the error is realized. Others may not trust it from the get-go or worry it will replace humans. This lack of understanding about AI's probabilistic nature and limitations, as well as its usefulness in augmenting work, can hinder widespread adoption and effective decision-making, particularly in dynamic customer interactions where accuracy and reliability are paramount.

To foster confidence, align expectations, and alleviate fears, it's essential to educate users about AI's capabilities and its limitations. In the contact center, you may use generative AI internally to evaluate analytics, to generate call summaries, or to write answers to commonly asked questions.

Implementing clear communication strategies, such as displaying confidence scores, helps users better evaluate AI recommendations. Furthermore, establishing strong governance structures, like oversight boards and a team of experts who evaluate any potentially customer-facing output, ensures AI systems are used responsibly. Finally, be transparent with operational goals and demonstrate how automation can ultimately ease time-consuming tasks for agents.

THE GOAL:
By prioritizing transparency and governance, businesses can build stronger trust and accurate, reliable, and valuable results from their conversational AI deployments.

9. Evolve with autonomous, outcome-driven agentic AI with guardrails

The next evolution of AI is agentic. It marks a meaningful shift from reactive, prompt-based tools to AI systems that can proactively and autonomously complete complex, outcome-oriented tasks. Relatively new compared to conversational and generative AI, agentic AI systems don't just respond to intent—they take initiative, adapt to changing context in real time, and work toward defined business goals.

Early use cases for the contact center are already in development. In these scenarios, agentic AI can autonomously automate processes such as logging service issues, coordinating follow-ups, or managing internal workflows. Still, human oversight remains critical. Guardrails like confidence thresholds and real-time monitoring ensure that teams can step in, adjust, or intervene as needed.

This isn't about removing people from the loop; rather, it's about enabling them to spend less time on repetitive, behind-the-scenes work and more time where they have the most impact.

THE GOAL:
Keep an eye on agentic AI advancements and consider how workflows can be shifted to AI for greater efficiency while still providing critical human oversight.

Essentially, some tasks have traditionally been done by humans that take time and aren't customer-facing. In the future, some of those manual and time-consuming tasks can be done with agentic AI. This can help teams have more time to focus on what matters, making human connections."

Abhii Parakh
Executive Director of Customer Experience and Insights, CVS Health

Wherever your contact center is on the automation and AI spectrum, there's always room to grow and bring further ease and efficiency to both customers and your agents. To discover where your company is on the path to harnessing conversational AI, automated personalization, and greater customer experiences — and to learn your next best steps — take our quick quiz.

Take our quiz

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ABOUT INTERACTIONS

Interactions provides Intelligent Virtual Assistants that seamlessly assimilate Conversational AI and human understanding to enable businesses to engage with their customers in highly productive and satisfying conversations. With flexible products and solutions designed to meet the growing demand for unified, omnichannel customer care, Interactions is delivering unprecedented improvements in the customer experience and significant cost savings for some of the largest brands in the world. Founded in 2004, Interactions is headquartered in Franklin, Massachusetts with additional offices worldwide.

For more information about Interactions, contact us:

866.637.9049
interactions.com