

Modernize Service

# Service Sophistication Model

**Assess – Transform – Lead**



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# Introduction

The race to deliver unique, satisfying customer experiences now requires reaching customers through every channel, at any time. Customers demand quick resolution and personalized experiences. Companies need to break down the silos between their departments, turning any employee into a customer service agent. The consequences for falling behind are measured not just in long hold times and abandoned calls but in lost customers and revenue, as well as dispirited employees.

**96 percent of customers report that they will abandon a brand based on poor customer service.<sup>1</sup>**

Looking out over the contact center landscape, it's clear that the race belongs to the swift. AI has accelerated everything—from the caller's expectations to the agent's capabilities, to an organization's case management, knowledge repositories, and the processes by which its services are optimized.

This document is designed to help your organization analyze your contact center capabilities against this new AI-accelerated marketplace. It's based on the lessons, insights, and expertise that we have gathered from supporting customer service transformations over decades.

As introduced in this document, the Service Sophistication Model provides a guide to help your organization evolve to a new level of service—addressing common pain points and enhancing experiences for both service agents and customers.

It's important to remember that there's no one-size-fits-all approach. While the model showcases a path to industry-leading service, the optimal level for your business depends on your specific goals and resources.

## The well-managed contact center in today's competitive market

Customers want to feel understood in one ongoing conversation, with seamless transitions between conversational chatbots; smart virtual agents; various communication channels; and chat, voice, and video interactions with live agents.

Callers who reach a well-managed contact center should expect natural interactive voice response (IVR) and chatbot conversations that employ strong contact center AI (CCAI) innovations in speech recognition, speech-to-text, multilingual support, and natural language understanding (NLU) algorithms.

<sup>1</sup> [Shep Hyken, "Ninety-Six Percent Of Customers Will Leave You For Bad Customer Service." Forbes, July 12, 2020.](#)

These hyper-personalized experiences use the organization's deep understanding of its customers to pair them with the ideal available resource in the customer's preferred channel. The first person the customer interacts with should be either the agent they worked with before or someone with all the support information that the first agent found relevant to the issue.

Grounded in large language models (LLM), generative AI is capable of deep learning from diverse knowledge sources to interpret context and extract features, patterns, and relationships from the data. As AI spreads, market leaders will accelerate bot building and deployment through effective NLU-powered chatbots and realistic IVR capabilities powered by generative AI.

Customers also need to feel that their data is safe. As generative AI innovations proliferate and adoption expands, advancements in security, privacy, and content accuracy can be expected to enhance responsible use of AI as well.

To be competitive, a well-managed contact center in today's marketplace should include:

- Cloud-unified communication and contact center as a service solutions (UCaaS/CCaaS) to help connect systems.
- Customer relationship management (CRM) solutions that add depth to the customer service experience.
- CCAI and carrier voice solutions that increase the efficiency and experience of customer service interactions.
- Workforce engagement/management (WEM/WFM) solutions that have evolved to manage resources effectively and further optimize service operations.

Industry-leading brands are already using AI to generate actionable intelligence, predictive analytics, robust knowledge management, and contextual collaboration, as well as robotic process automation (RPA) to introduce process improvements at rapid scale.

On the back end, contact centers need the flexibility to connect to modern cloud telephony systems that have worldwide scale and give service organizations the option of bringing their own operator. Built-in, native voice calling should offer voicemail, callback, auto attendants, agent direct calling, outbound engagement features like short message service (SMS) notification systems, and more for a low overall total cost of ownership.

It's not enough to deliver any of these advancements piecemeal. Without a truly connected modern contact center and customer service covering all these capabilities, organizations will be held back by siloed service information, losing opportunities to improve their customers' experience.

## Service Sophistication Model

The Service Sophistication Model is based on a broader digital transformation guide that ranges from simple and siloed to intelligent and connected. The model allows for organizations of all capacities, from bare-minimum capabilities through a truly innovative, industry-leading ability to provide customer service support. (Figure 1)

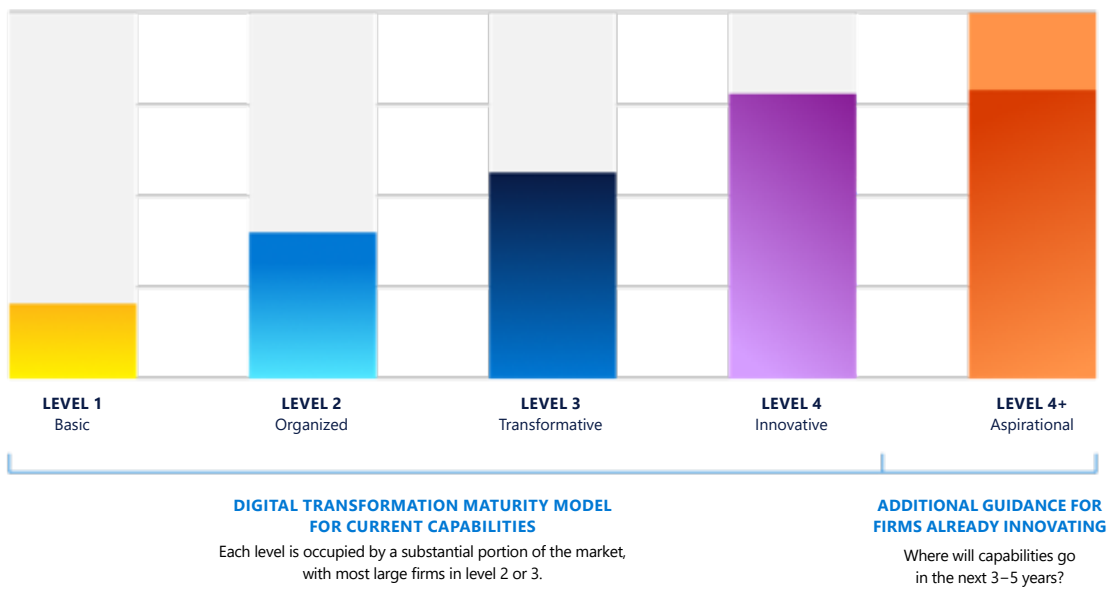


Figure 1. Levels for Service Sophistication Model

The Service Sophistication Model, applicable to customer service and contact center management, enhances customer care by integrating solutions for end-to-end service operations. Industry leaders have boosted customer satisfaction by connecting teams and processes, achieving a holistic view of customer engagements, and progressing toward a modern contact center with defined capability levels in four major categories:



Explored through the framework of the model, the assessment and associated guidance for each capability level are based on the core characteristics of that level (as listed in the following table).

## The Service Sophistication Model: Quick-look summary

<b>LEVEL</b> <b>01</b> <b>Basic</b>	<b>Simple manual processes</b> Agents engage with customers reactively while teams communicate asynchronously. Managing complex issues with manual processes leads to long wait times. Service is optimized through manually analyzed customer feeds and recorded interactions.
<b>LEVEL</b> <b>02</b> <b>Organized</b>	<b>Basic technology tools and metrics</b> Introduces chatbots and agent routing with relevant information saved to customer profiles and scheduled callbacks enabled. Teams communicate in real time, synchronously. Performance metrics are tracked.
<b>LEVEL</b> <b>03</b> <b>Transformative</b>	<b>Data-driven automation and efficiency</b> Provides seamless customer engagement across channels, with automated routing and detailed customer and case information available to agents. System optimizes through rules-based analysis.
<b>LEVEL</b> <b>04</b> <b>Innovative</b>	<b>AI-driven optimization</b> Takes advantage of conversational AI chatbots and virtual assistants for proactive alerts and seamless transfers to the right agent for the customer. Real-time optimization with AI and integrated WEM/WFM solutions are built into process improvements.
<b>LEVEL</b> <b>04+</b> <b>Aspirational</b>	<b>Cutting-edge technologies</b> Customers can enjoy a hyper-personalized service experience with innovations like conversational AI and proactive outreach. Next-generation AI further accelerates agent productivity, workflow efficiency, and business transformation.

# Engaging customers on their terms

**Delivering consistent, effective customer service experiences means providing the same level of service regardless of the channel a customer chooses to use.**

- Customers should be able to access support services anytime, anywhere, and through the channel that works best for them.
- Agents should be able to engage on any channel and switch seamlessly between them.
- Generative AI enhances the engagement via natural language conversations and easier building and deployment of self-service engagement tools like IVR or chatbots.
- Agents should be empowered with outbound engagement tools and services that enable them to proactively notify customers with updates, leading to lasting customer relationships.

## KPIs

### ^ Increased

- Customer Satisfaction (CSAT)
- Net Promoter Score (NPS)
- Call deflection rate
- Fulfillment speed

### v Decreased

- Repeat contact rate
- Cost per contact
- Cost per conversation
- Inbound abandon rate



## Capability levels

	LEVEL 1 Basic	LEVEL 2 Organized	LEVEL 3 Transformative	LEVEL 4 Innovative	LEVEL 4+ Aspirational
Self-service	Static wikis and frequently asked questions (FAQs) for simple problems	Detailed guidance for common issues through portal access and communities	Detailed account history and searchable knowledge base	Customer-facing dashboards and service alerts or insights	Generative AI-driven proactive service
Chatbots	None	Basic chatbots built using low-code/no-code (LCNC) or pre-defined templates	Rules-based chatbots direct to self-service or agent with background	Conversational chatbots that use generative AI and NLU	Optimized chatbot build and deployment with generative AI
Voice channel and VR	Human agents only	Call steering and issue triage and escalation	Automated information gathering and handoff	Seamless agent transition and outbound engagement capabilities	Advanced biometric security and conversational AI
Digital engagement channels	Connection between channels with shared ecosystem	Digital support and information gathering across all channels	Information and context integration across channels	Seamless transitions between channels	Robust conversational AI agents that move between channels
BUSINESS CAPABILITIES					

Figure 2. Simplified breakdown of capabilities

### Level 1

Organizations at this level swiftly address simple customer needs but lack effectiveness for complex or tailored service and would benefit from sharing historical customer information across channels. These organizations typically:

- Offer consistent, straightforward products or services with minimal support requirements and service documentation, including simple FAQ pages and basic information for agents.
- Deliver customer experiences through reactive channels, such as contact centers, email requests, and static online resources.

### Pain points

- Agents must resolve a high volume of basic inquiries or FAQs.
- Agents aren't available around the clock to help with complex problems.



## **Level 2**

Organizations at this level match up with industry peers by tracking performance metrics and offering self-service options via portals, live chat, and communities for quick answers and enhanced information, plus around-the-clock agent support for critical issues.

These organizations typically:

- Allow customers and agents to view past requests and reopen them if needed.
- Offer expanded self-service options, including an accessible knowledge base, basic chatbots built with pre-defined templates or LCNC approaches, and options to escalate requests to a live agent for assistance.
- Route complex issues to an agent along with some background information.
- Begin to benefit from digital community resources on existing infrastructure.

### **Pain points**

- Customers struggle to manage their accounts and find relevant answers in service portals.
- Chatbots based on pre-defined templates offer limited support.

## **Level 3**

Organizations at this level with complex service needs, expanded product suites, and digital maturity employ a transformative approach to customer service that increases satisfaction and identifies areas for improvement, potentially driving increased purchases.

These organizations typically:

- Begin to improve service and support operations using service interaction data, saving detailed records of all interactions to offer customers near-seamless experiences.
- Expand both the content in their knowledge base and access to it for both agents and customers with self-service and automated assistants, pointing to the most relevant resources.
- Offer additional communication channels outside of business hours with virtual agents and escalating to a human agent when required.

### **Pain points**

- Evolving regulations and rising customer expectations make data security crucial.

#### **Level 4**

Organizations that prioritize innovative, profit-driven omnichannel customer service for market distinction focus on exceeding customer outcomes and see service as a way to grow the business. These organizations typically:

- Prevent customer issues and deliver personalized support using aggregated intelligent signals and connected data that provide insight into service needs.
- Implement a multi-channel support system using generative AI and NLU to enable seamless handoffs between virtual agents, human agents, experts, and popular social media apps.
- Provide outbound engagement mechanisms for agents to contact customers.
- Incorporate knowledge resources from moderated online communities into the automated support process and link customers directly to relevant posts.

#### **Pain points**

- Transferring customers from automated IVR or chatbots to human agents can often be inefficient, with agents not having adequate background to help customers without repeating themselves.

#### **Level 4+**

What's next for omnichannel engagement? Market leaders will spend the next few years developing and providing seamless omnichannel journeys with fast, frictionless interactions between virtual agents and humans. These organizations will:

- Offer differentiated experiences for each customer's needs through channel-less engagement that uses the characteristics of each channel.
- Be able to easily add new channels and touchpoints for new customer needs.
- Establish meaningful, proactive customer relationships with better outbound engagement through different voice or digital engagement channels.
- Use generative AI innovations to author knowledge articles and build and deploy self-service virtual assistants to accelerate the service experience.

# Routing service requests intelligently

**Connecting with customers using their preferred channels needs unified routing for a smooth experience. AI-based routing helps provide a more efficient and personalized service across channels.**

- Connecting customers with the best-suited agent based on skills, effort, and other relevant factors solves the issue quickly, improves agent productivity, and builds trust and credibility.
- Quick interactions across unified channels and contact centers simplify the customer journey and deliver consistent and efficient routing from any channel.
- Intelligent issue prioritization, triage, and assignment lowers the cost of connecting customers to resources and improves the efficiency of agents.
- When agents have well-balanced workloads and assignments that are appropriate to their expertise, they're both happier and more able to effectively solve customer issues.

## KPIs

### ^ Increased

- Agent/employee productivity
- First call resolution rate

### v Decreased

- First response time
- Customer handover rate
- Average call transfer rate



## Capability levels

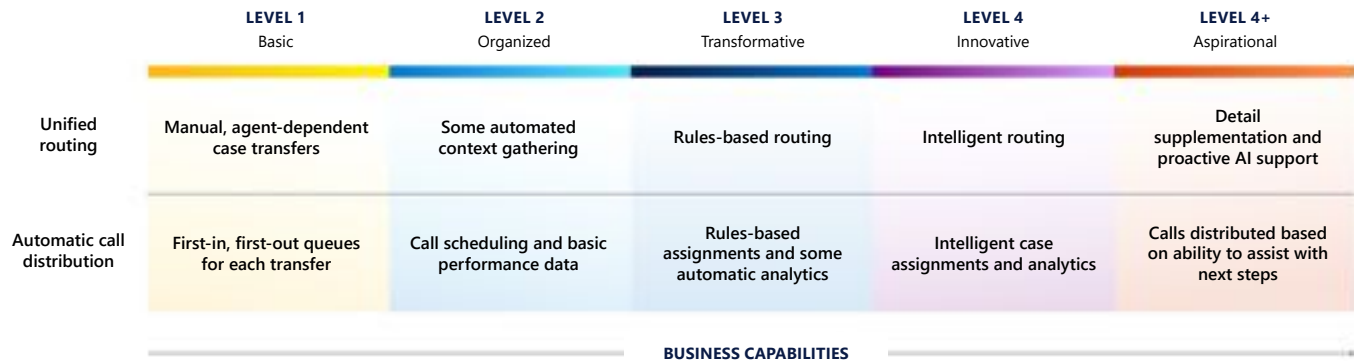


Figure 3. Simplified breakdown of capabilities

### Level 1

Organizations at this level base service-request routing on queue of next-available agents. This approach doesn't distinguish between accounts or service needs until the first agent contact, who either solves the issue or routes it to another department service queue. These organizations typically:

- Deal with request bottlenecks and delays during peak support times.
- Use an entry-level agent to gather information, categorize, then route service needs.
- Manually transfer incoming requests to the appropriate team or department.

### Pain points

- Human error often occurs in capturing and conveying customer service needs.
- Call routing is inefficient and transfers are excessive.
- Customers face long wait times and poor experiences.

## Level 2

Organizations at this level convey basic account details, service needs, and context to agents to address process bottlenecks and pain points. Prioritizing contextual expedience, organizations deploy these capabilities for account validation or service-specific feedback. These organizations typically:

- Provide their agents with background on the issue.
- Improve queuing with shorter wait times and call scheduling capabilities.
- Manage the workforce and improve performance by reviewing routing analytics periodically.

### Pain points

- Agents need to understand proper escalation channels and identify available resources or wait in queues with the customer to hand over the case.
- Customers experience multiple transfers and some repetition of information.
- Routing performance must be manually analyzed.

## Level 3

Organizations at this level are able to use data to prioritize, improve, and automate routing decisions, offering a more predictable service. These organizations typically:

- Automatically prioritize incoming service requests and either assign the case to the correct person or direct the customer to the correct resource based on factors such as agent skills and availability.
- Transfer escalations along with relevant case context to the appropriate agents based on information gathered by the initial agent or virtual assistant.
- Analyze workforce-level availability and resource management trends that incorporate individual schedules and skillsets.

### Pain points

- Assignments rely on rules-based protocols that don't cover some situations well, requiring human input.
- Relevant ancillary service needs can be missed and avoidable tickets are raised.
- Assignments are prioritized based on simple attributes rather than specific expertise requirements, sentiment response, and past performance.

#### **Level 4**

Organizations at this level prioritize the customer experience, using AI to analyze and predict customer behavior, then assigning the customer to the best agent that can handle the issue. These organizations typically:

- Seamlessly transfer service requests between channels, virtual assistants, and agents, regardless of the channel provider or underlying system.
- Select experts based on availability, efficacy, and previous performance.
- Analyze, diagnose, and resolve routing performance and availability issues.

#### **Pain points**

- Virtual agents aren't identifying all predictable upcoming service needs.
- Proactive service requests aren't effectively factored into case distribution estimates.

#### **Level 4+**

What's next for service-request routing? Industry-leading customer service organizations will use unified, intelligent omnichannel routing to connect with customers through their preferred channels. These organizations will seek to:

- Incorporate robust, machine learning–supported automatic classification and intelligent assignment using generative AI to supplement algorithms.
- Classify incoming service requests from any channel consistently, considering customer signals like predictive behavioral attributes, live sentiment, required skills, and effort estimation.
- Assign agents based on live operational data and employee signals, inclusive of the likely next-best actions and necessary background knowledge.

# Managing and resolving cases efficiently

**Accelerating resolution of complex service issues and improving employee productivity requires efficient case management tools and workflows. Quick onboarding and a single unified workspace for agents—with the ability to use knowledge resources and collaborate with experts across the organization—is critical for faster resolution and driving increased customer satisfaction.**

- Agents can drive customer loyalty by personalizing customer experiences. To do this, agents must be able to access holistic customer and interaction data, including context and service history.
- Intelligent productivity tools, generative AI-based innovations, and a modern multi-session agent workspace further empower agents to independently and quickly resolve issues.
- Service delivery is consistent across all channels and agents are empowered to rapidly and effectively resolve customer issues.
- Agents have access to cross-team collaboration for expert guidance from supervisors and subject matter experts who have resolved similar cases.

## KPIs

### ^ Increased

- Customer Satisfaction (CSAT)
- Service and quality (SERVQUAL)
- Process time savings
- Staff efficiency and training
- Number of resolved cases per agent
- First call resolution rate

### v Decreased

- Costs of manual data entry
- Escalation rate
- Staff turnover
- Case resolution time
- Average handle time



## Capability levels

	LEVEL 1 Basic	LEVEL 2 Organized	LEVEL 3 Transformative	LEVEL 4 Innovative	LEVEL 4+ Aspirational
Self-service	Asynchronous team communication via email or messaging	Synchronous, real-time team communication via live chat	Team collaboration with peers and experts to share knowledge and expert guidance	Real-time team collaboration for shared workspaces, dashboards, and file sharing	Collaboration tool as UI for customer services, collaboration, and dashboard
Agent experience	Form-based user interface with basic customer data	Modern user interface with relevant customer and support information	360-degree view of customer profiles, service history, transcripts, and interactions via an integrated case management system	Multi-session agent experience with AI-enabled intelligent agent forecasting, scheduling and productivity tools, analytics, and RPA	Generative AI-driven acceleration of agent ramp-up, case resolution, and improved productivity
Knowledge management	Static information, articles, or blogs with simple guidance for customer support	Detailed, defined guidance and knowledge on steps for customer support on common and recurring issues	Detailed, defined guidance and knowledge on steps for customer support on complex or unique issues	AI-enabled actionable or predictive insights and next-best actions for common and recurring issues	AI-enabled actionable or predictive insights and next-best actions for advanced and complex issues

BUSINESS CAPABILITIES

Figure 4. Simplified breakdown of capabilities

### Level 1

Organizations at this level aim to resolve requests by providing relevant resources with shorter waits and fewer escalations. These organizations typically:

- Track and manage all customer requests using a basic form-based user interface.
- Retain knowledge articles, blogs, or wikis for basic customer support guidance.
- Asynchronously share knowledge among agents using communication tools.

### Pain points

- Agents rely on their knowledge and information gathering to resolve requests.
- Agents rely on their own procedures for tracking and managing requests.
- Customer wait times and volume of unresolved requests are higher.



## Level 2

Organizations at this level organize and streamline service requests, detailed customer profiles, and support information (including health scores) with case management capabilities. These organizations typically:

- Meet customer service level agreements (SLAs) and achieve KPIs.
- Retain knowledge resources—such as detailed guidance, examples, and steps for customer support for historical issues or requests—to upskill support abilities.
- Use real-time communication such as live chat to obtain expert guidance.

### Pain points

- History of service and related interaction data isn't effectively maintained.
- Service requests are managed independently with basic capabilities, resource scheduling, and customer data.
- Collaborating in real time with experts during resolution is difficult.

## Level 3

Organizations at this level maintain service requests, history, and feedback to enable a holistic view of the customer. Structured knowledge management systems and real-time collaboration tools empower teams to resolve a higher number of requests efficiently. These organizations typically:

- Pull first- and third-party data into a single platform that presents a 360-degree view of the customer to better understand their unique needs.
- Maintain interaction and transcript data (including feedback and service history) to preserve the context of each request, especially revisited or escalated requests.
- Reduce case resolution time with tools that enable real-time collaboration on customer requests, improving access to shared workspaces, dashboards, and files.

### Pain points

- Real-time support personalization while engaging with the customer is difficult due to limited predictive data, analytics, and insights.
- Balancing repetitive tasks with customer engagement during resolution is challenging.

#### **Level 4**

Organizations at this level focus on agent experience for market distinction, emphasizing staff efficiency, faster training, and process-time savings to foster customer loyalty and growth. These organizations typically:

- Automate case and conversation summarization using generative AI capabilities to expedite ramp-ups, hand-offs, and wrap-ups to move on to the next case.
- Use smart virtual agents to assist human agents in resolving common issues and predicting upcoming service needs based on the account or product.
- Enhance customer satisfaction with conversational, sentimental analytics and predictive insights that personalize support in real time for faster resolutions.
- Offer a single multi-session interface, minimizing the need to switch between applications to gather information, collaborate, or view schedules via third-party WEM/WFM systems.

#### **Pain points**

- Capabilities for real-time and automatic translation and transcription are limited.
- There's minimal integration between collaboration and case management for requests that require real-time resolution and guidance from experts.
- Next-best actions can be restricted to known or historical customer issues.
- Robotic automation can be confined to simple repetitive tasks.

#### **Level 4+**

What's next for case management and resolution? Market-leading service organizations will empower agents to build customer trust with the right information, skills, and insights to manage complex, unique requests. These organizations will:

- Use a rich collaboration platform that embeds intelligent context within apps.
- Empower agents to evolve using generative AI-powered innovations.
- Deploy interoperable WEM/WFM systems with CRM applications for forecasting, scheduling, and resource management.
- Enable real-time troubleshooting with co-browsing across platforms.

# Optimizing service operations

**Improving your organization's customer service operations and processes requires a deep understanding of customer needs and challenges. Ongoing analysis reveals the difference between an acceptable experience and one that builds trust and confidence.**

- Connecting workflows can enhance the efficiency of a customer service organization, especially when supplemented with automatically generated, intelligent insights and suggestions.
- Tailoring responses to a customer's individual issue severity and sentimental evaluation can eliminate some of the largest agent frustrations and improve customer satisfaction drastically.
- Orchestrating resources through a WEM/WFM system enables your organization to meet diverse customer needs and fluctuating service demands.
- Generative AI-related metrics can offer additional insights on usage and business impact.

## KPIs

### ^ Increased

- SERVQUAL
- Generative AI active users
- Percentage generative AI responses used

### v Decreased

- Inbound abandon rate
- Minutes spent on call
- Average resolution time



## Capability levels

	LEVEL 1 Basic	LEVEL 2 Organized	LEVEL 3 Transformative	LEVEL 4 Innovative	LEVEL 4+ Aspirational
Real-time insights	Manual analysis of solicited feedback	Aggregated but manually analyzed data across most systems	Rules-based alerts and analysis from integrated databases	Dynamic and adjustable dashboards providing AI-driven insights	AI-driven insights expanded to include generative AI metrics
Conversations and sentimental analysis	Manual reviews of recorded interactions and feedback	Consolidated feedback on performance provided by supervisors	Recordings and transcripts used to extract insights automatically	Real-time sentimental cues and conversational analytics used for coaching and case assignment	Optimized insights and service escalations and interventions to minimize difficult interactions
Robotic process automation and resource management	Periodic process reviews and revisions	Structured process improvement guidance to drive improvements	Some automated process improvement suggestions and implementations	RPA workflows for process improvements, integrated WEM/WFM solutions for resource forecasting and scheduling	Automated process improvements from intelligent RPA, along with native WEM/WFM integrations
BUSINESS CAPABILITIES					

Figure 5. Simplified breakdown of capabilities

### Level 1

Organizations at this level rely on human intervention, which may mean missing opportunities to streamline the service experience. Individual supervisors bear the responsibility of mitigating process inefficiencies. These organizations typically:

- Operate in siloed teams with noticeable variability in performance and efficiency.
- Identify issues from raw interaction records, optional feedback systems, spreadsheets, and simple scorecards.
- Reactively provide feedback and analysis on performance.

### Pain points

- Process improvements are haphazard and inconsistent.
- Analysis depends on individual supervisors' insights and metrics interpretations.
- Many impactful process issues go unnoticed by the organization.

## **Level 2**

Organizations at this level rely on aggregated data gathering and presentation that better informs and standardizes process improvements, leading to more consistent results. These organizations typically:

- Consolidate insights in consistent—but manually updated—scorecards.
- Aggregate metrics across the organization to evaluate performance data and issues and call attention to needed improvements across multiple siloed systems.
- Review agent performance with structured surveys, scorecards, and sample interaction records.
- Implement organization-wide changes with consistent guidance to regularly refresh best practices and improve performance.

### **Pain points**

- Process improvements aren't always obvious and can be difficult to quantify.
- Performance analysis methodologies have substantial gaps and are often inconsistent in capturing information, interpretation, or delivery to supervisors.
- Improvements are time-consuming to implement.

## **Level 3**

Organizations at this level enrich process improvements with automatically gathered feedback analysis or dashboard-based insights for issues that are missed when analyzing reactively or in more narrow contexts. These organizations typically:

- Use data-driven insights to improve overall cost, efficiency, and service quality issues more effectively and start to identify issues missed by supervisors.
- Provide regularly updated dashboards for service analytics and performance.
- Automatically generate insights from agent performance and customer feedback, including interaction transcripts and simple rules-based performance evaluations.
- Automatically integrate process improvements into workflows and guidance.

### **Pain points**

- Improvements can be difficult or costly to implement, even when simple.
- Feedback and coaching insights can be inconsistent, resulting in issues escalated between review cycles.
- Directing difficult cases to experienced resources can be challenging.

### **Level 4**

Organizations at this level evaluate customer interactions for sentiment-based interventions and immediately eliminate inefficiencies with automated processes and real-time predictive insights on dynamic dashboards. These organizations typically:

- Use generative AI-supported insights to enrich and expand performance analytics.
- Present dashboards integrated with WEM/WFM systems to show agent shifts, schedules, forecasting, and resource management.
- Defuse difficult situations with real-time automatic feedback accounting for sentimental cues and insights from conversational analytics.
- Use RPA to automate repetitive tasks, drive process improvements, and implement data analytics insights.

### **Pain points**

- Robotic process improvements can be limited to simple task flows.
- Handling unique sentiment analysis is difficult even with clear sentiment insight.

### **Level 4+**

Where is process improvement going next? Industry leaders in process automation and analytics will use LCNC solutions to improve customer support systems and empower decision makers to be developers. These organizations will:

- Incorporate real-time KPI-management recommendations that flag needed interventions while providing conversational insights through a dynamic, generative AI-based guidance platform.
- Use case outcomes and conversational insights to transform processes, products, and organizations beyond the contact center in areas such as product development, employee experience, and operational improvements.

# Guidance

## **Engaging customers on their terms**

Organizations that only provide voice calling may wish to consider using IVR and chatbots to enhance self-service capabilities. Those already deploying IVR and chatbots can benefit from upgrades with conversational AI to enhance the experience. Generative AI combined with LCNC technology makes building and deploying these self-service tools easier than before, delivering on both cost efficiency for service leaders and modern experiences that customers expect.

Along similar lines, contact centers should consider becoming modern contact centers with digital engagement channel support. Starting with SMS and email, they can expand to live chat, IVR, and chatbots and to popular social media apps that provide an easier and richer experience.

## **Routing service requests intelligently**

Organizations that route issues manually or to the next available entry-level agent should embrace automation, assigning cases to agents based on skills. If the organization has undergone digital transformation, it should take advantage of the systems and data to route issues to experts, using factors beyond just skills and availability and reducing the dependency on entry-level agents. Organizations can go further with AI-based routing, which can include factors such as behavior and sentiment to assign the case to the best-suited agent.

## **Manage and resolve cases efficiently**

More efficient case management starts with systematically organizing and managing customer profiles and support information, plus providing agents with tools for interacting with peers and experts in real time. Optimization continues through an omnichannel experience that brings customer profiles together with interaction data, consumer characteristics, and service and feedback history.

Augmenting collaboration tools with file sharing, dashboard creation, and shared workspace capabilities not only supports greater staff efficiency but cultivates a workplace that retains talent. Providing an all-in-one, multisession agent experience that addresses repetitive processes through RPA allows the agent to better focus on the customer, improving first-call resolution rates and process-time savings. Investment in automated information gathering and generative AI turns agents into super-agents, accelerating case resolution and streamlining ramp-up, hand-off, and wrap-up processes.

### **Optimizing service operations**

Organizations evolving their service operations can start by focusing on consistency, including the data sets provided to decision makers; capturing, communicating, and storing performance feedback; and guidance for improving workflows. They can then use an integrated system to configure systematic workflows and process improvements, automatically consolidating data while recording and digitizing customer service interactions for performance reviews.

Moving forward with both rules-based and AI-supported insights, organizations can provide real-time automatic analysis, feedback, and intervention with specific, relevant recommendations. To further improve service operations, they can look to generative AI while using WEM/WFM solution integrations for resource forecasting, scheduling, and comprehensive visibility.



## Conclusion

Whether it's communicating through omnichannel, employing AI-first functionality, deploying self-service conversational AI bots and IVR, exploring CRM integration, or adding unified routing, Microsoft's suite of products enabled with generative AI can help you evolve your contact center into an innovative, state-of-the-art customer service or contact center.

## Relevant products

[Microsoft Dynamics 365 Customer Service](#)

[Microsoft Copilot for Service](#)

[Microsoft Copilot Studio](#)

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