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Unlocking the Power of AI in Contact Centers – Without Losing the Human Touch

Sharon Oatway, President & Chief Experience Officer, VereQuest

A practical guide to building human-centered AI strategies that elevate the customer experience, empower agents, and strengthen trust.

AI is reshaping the contact center — improving speed, accuracy, and insight at a scale once unimaginable. Yet technology alone doesn't create loyalty or empathy.

This Playbook explores how to adopt and integrate AI responsibly, ensuring that innovation enhances rather than replaces human connection.

Need help? We work with contact centers to deliver smarter, faster, and more human service. *info@verequest.com*

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A New Era for Human-Centered Service

80% of customer service organizations will use AI by end of 2025* — yet most struggle to realize ROI because of cultural and human readiness gaps.

Artificial intelligence has moved from promise to practice.

Across every industry, contact centers are introducing automation, analytics, and “co-pilot” tools that promise faster service, lower cost, and deeper insight. Yet, as technology adoption accelerates, many organizations struggle to capture real value.

At VereQuest, we believe success lies not in *deploying* AI, but in *adopting* it — aligning people, processes, and purpose so that technology amplifies rather than replaces the human experience.

This Playbook is designed to guide leaders, coaches, and change agents through that adoption journey — step-by-step, from vision to measurable outcomes.

It blends the practical (tools, templates, checklists) with the human (stories, lessons, and mindsets that sustain trust). Whether you’re beginning to explore AI, running pilots, or scaling enterprise-wide, this Playbook provides a roadmap for responsible, human-centered AI adoption.

“AI achieves its highest potential when humans remain in the loop — guiding its purpose, questioning its outputs, and grounding it in empathy.”

Sharon Oatway
Chief Experience Officer
VereQuest

*Gartner, *Top Strategic Predictions 2025: AI in the Contact Center(2024)*

Understanding AI in the Contact Center

A quiet revolution is underway. Within just a few years, contact centers have evolved from purely reactive service hubs into intelligent ecosystems — orchestrating interactions across voice, chat, video, and social channels.

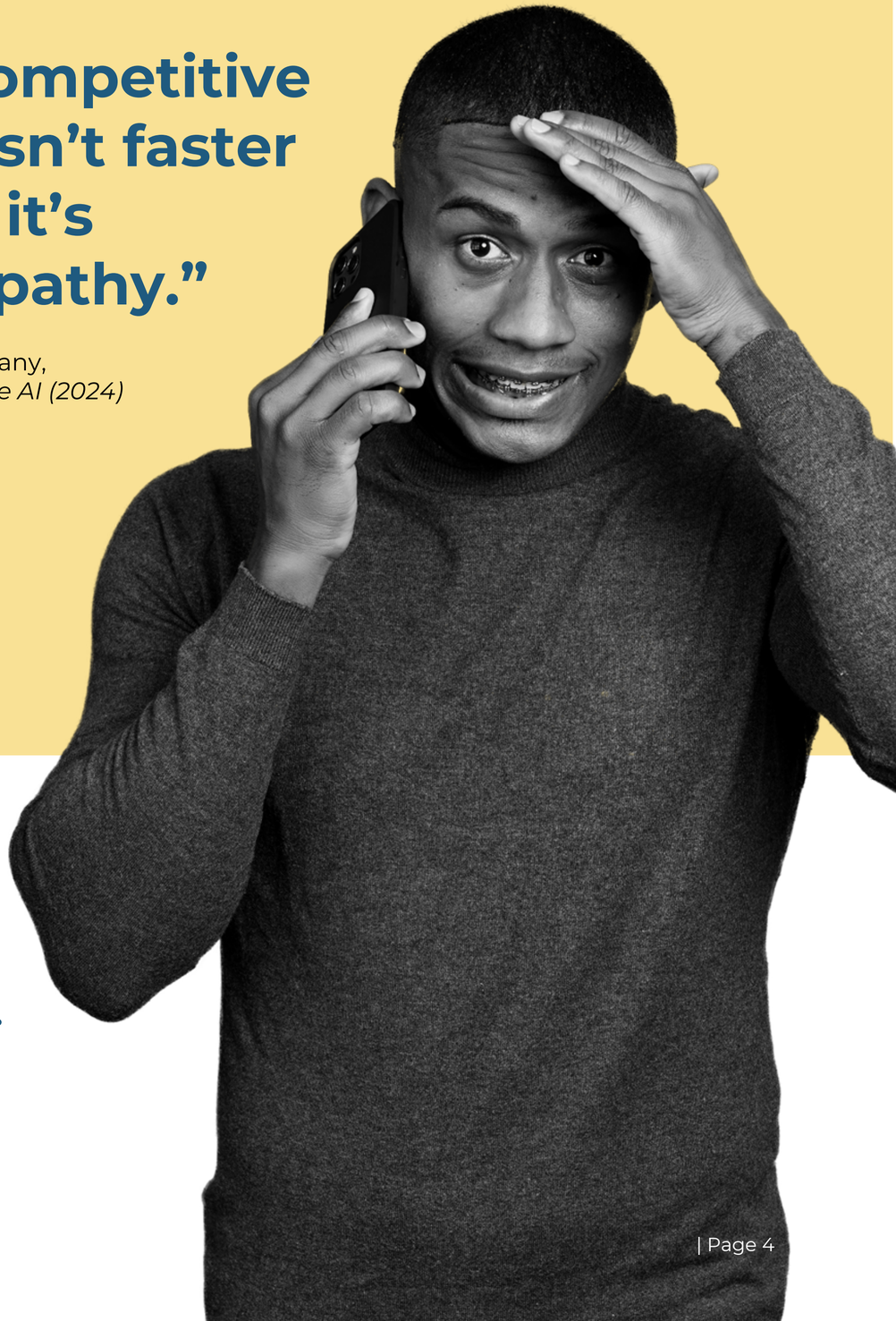
AI now plays a role in nearly every stage of that journey:

- **Generative AI** creates summaries, drafts responses, and retrieves policies in seconds.
- **Predictive AI** anticipates needs and recommends next actions.
- **Agentic AI** acts almost like a co-worker — guiding, escalating, and learning from experience.

Yet the story isn't only about efficiency. It's about augmentation — giving humans the time and insight to be **more human**.

"The next competitive advantage isn't faster response — it's smarter empathy."

Inspired by McKinsey & Company,
The Human Side of Generative AI (2024)



The contact center of tomorrow blends algorithmic precision with authentic connection.

The challenge — and the opportunity — lies in getting that balance right.

The Shift from Automation to Orchestration

Earlier generations of contact-center technology focused on automation — removing human effort. The new wave focuses on **orchestration** — harmonizing human and digital efforts in real time. In practice, that means:

- ✓ Letting AI handle the repetitive and the routine.
- ✓ Empowering agents with insight and guidance at the moment of truth.
- ✓ Equipping leaders with data that informs, not overwhelms.

This orchestration mindset reframes AI as a *partner* rather than a *project*. It is not an add-on to existing systems but a catalyst for re-imagining service itself.

Done right, AI can become the engine of a more human contact center — one that is faster, smarter, and more compassionate. It can:

- ✓ Increase service quality and consistency.
- ✓ Reduce agent burnout and turnover.
- ✓ Transform QA into continuous coaching.
- ✓ Enable leaders to focus on strategy, not firefighting.

The future belongs to those who integrate AI thoughtfully — balancing technological ambition with human purpose.

Are You Ready for Orchestration?

- ✓ *Clear CX vision anchored in human values*
- ✓ *Defined agent roles post-AI introduction*
- ✓ *Governance for AI accuracy and ethics*
- ✓ *Plan for ongoing coaching and recalibration*

AI tools that support the contact center tend to appear from multiple directions — each solving a specific business problem or enhancing a particular step in the customer journey.

AI Agent Assist

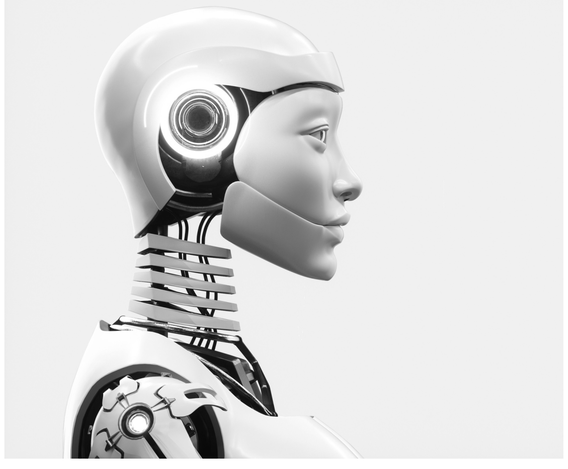
Listens, reads, and analyzes what's happening in real time — then offers helpful suggestions, relevant information, or guidance during live interactions.

Improves service quality and speed, reduces stress and memory load, and builds confidence.

Automated Quality Assurance (Auto QA)

Evaluates 100% of interactions against pre-defined criteria using speech or text analytics. Can also detect customer sentiment and emotion.

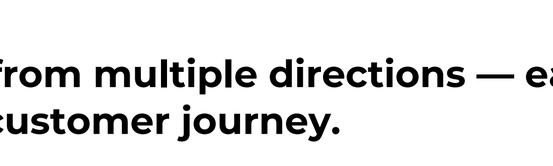
Provides greater insight and faster feedback for targeted coaching.



AI Chatbots & Self-Service

Handles high-volume, low-complexity inquiries by supporting customers as they self-serve.

7/24 support; frees agents to focus on complex, emotional, or high-value inquiries.



Workforce Optimization & Forecasting AI

By analyzing historical data, predicts when, where, and how many agents will be needed – and who is beset suited for each tasks.

Smarter schedules, balanced workloads, and identifies high risk situations.

Predictive Routing

Uses customer historical data to match each contact with the best possible agent – one that has the skillset and demeanor most likely to resolve the customer's issue satisfactorily.

Better match between need and skill, resulting in faster resolution and higher satisfaction.

AI Co-Pilot

Works alongside humans by recognizing intent and surrounding details, and then assists users in making informed decisions and completing parts of complex workflows.

Increases accuracy and efficiency by automating multi-step tasks while still keeping a human in control.

AI Adoption in Action

“AI transformation isn’t about replacing people with technology — it’s about replacing friction with flow.”

Technology adoption succeeds or fails not because of algorithms — but because of people.

The following case studies illustrate how contact centers across various industries have responsibly, measurably, and empathetically introduced AI. Each story is structured around three lenses:

Business Need → Human Experience → Measurable Impact.

Case Study 1 - From ~3% to 100%: QA Automation in Consumer Goods

https://www.creovai.com/case-study/thrasio

The Challenge

Evaluate all customer interactions across multiple channels and uncover objective insights to deliver an exceptional customer experience.

Background

- Thrasio, a next-generation consumer goods company, was only able to manually review about 3% of customer calls each month, and they knew they were missing valuable insight in the remaining 97%.
- They estimated it would have taken a team of 528 analysts to manually review 100%.
- In addition to quality, Thrasio saw the value of leveraging customer service phone, chat, and email interactions to more quickly uncover and quantify product issues.

The Approach

An AI-driven QA engine was deployed to transcribe, score, and flag 100% of customer interactions using predefined quality criteria (accuracy, tone, compliance adherence).

Human Enablement

- Specialists reviewed calls, tickets, etc., when the confidence rating was below a specific threshold to refine accuracy.
- Specialists reviewed all interactions that were identified as ‘escalations’ for immediate action.
- Analysts calibrated scores to maintain fairness and interpret sentiment patterns.
- Supervisors learned to turn data points into meaningful feedback conversations.

Thrasio’s team of QA analysts were only able to manually audit about 3% of interactions.

They estimated it would have taken a team of 528 analysts to manually review 100%.

Key Outcomes

- Combining automation with calibration preserved fairness and trust.
- Analysts evolved into *Insight Coaches* — interpreting trends, not just scoring calls.
- Leadership leveraged data to identify and quantify product issues.
- Fraudulent buyer messages were identified to help make informed policy changes to mitigate the risk of future fraudulent interactions.

Case Study 2 – 50% Faster Onboarding with AI Agent Assist

https://resultscx.com/case-study/ai-driven-agent-assist-drives-faster-agent-onboarding-reduction-in-aht-for-telecom

The Challenge

Enhance operational efficiency while taking the customer experience to the next level.

Background

- ResultsCX's client, a major telecommunications provider, was facing escalating complexity in its customer support operations: agents handled high-volume inquiries across wireless programs, needing instant access to relevant information during calls. Manual knowledge retrieval slowed response times, increased error risk, and created onboarding bottlenecks for new agents.

The Approach

- Given the fast-evolving nature of customer inquiries, regulatory requirements, and the volume of interactions, the environment was ripe for a real-time assist solution: the support workflow was structured, verbose, and knowledge-rich.
- The team deployed an AI-driven Agent Assist platform that integrates directly with telephony systems. It listened to live conversations, detected intent, and pulled in relevant knowledge base content, presenting "next best action" guidance and workflow prompts in real-time.

Human Enablement

- Rather than positioning AI as a replacement for agents, the initiative framed it as a partner to amplify human capability.
- Agents were freed from searching multiple systems mid-call, allowing them to focus more on what patients/customers say — their emotion, urgency, context, and need for reassurance.
- Supervisors used the analytics derived from the AI platform to tailor coaching sessions around real moments: when the AI suggested, when the agent ignored or augmented it, and how customer outcomes varied.
- Agents felt supported, not monitored; they gained confidence, spent less time switching contexts, and had richer interactions with customers.

Key Outcomes

Within just two months:

- Agent onboarding time reduced by up to 50%, accelerating time to proficiency.
- Average Handle Time (AHT) dropped by up to 20%, improving efficiency.
- Agent error rates dropped by up to 80% as access to relevant knowledge improved.
- Enhanced consistency and quality of customer interactions across channels.

Real-time AI Agent Assist reduced time spent searching and documenting, allowing agents to stay fully engaged with the customer.

Case Study 3 - Healthcare Scheduling with AI Agent Assist

https://ccdcare.com/resource-center/ai-driven-operational-flows-in-healthcare/

The Challenge

Improve efficiency, reduce errors, and scale operations in high-volume, routine appointment scheduling.

Background

- CCD Health is a healthcare business process outsourcing firm that delivers patient contact and scheduling solutions for hospitals and outpatient specialty centers.
- One of its clients, Capitol Imaging—a leading medical imaging provider—faced growing patient demand that strained its scheduling operations. This resulted in high cost per appointment, slow agent ramp-up, and operational inefficiencies driven by inconsistent training and limited trust in the process.
- These scheduling challenges didn't just affect call center performance—they disrupted the entire patient care journey. CCD Health recognized that even small improvements in this area could unlock several hours of staff capacity each week and create a more consistent patient experience.

The Approach

- CCD identified patient appointment scheduling as the ideal starting point for AI adoption. It is one of the most repetitive and structured workflows in the healthcare contact center—high in volume, low in variability, and governed by clear rules.
- By beginning in this space, CCD Health was able to introduce AI in a low-risk environment where automation could deliver immediate efficiency gains without disrupting clinical judgment or patient relationships.

> **The key is to think of AI not as a replacement for your staff, but as a way to take the weight off repetitive processes so your teams can focus on the parts of care that truly need human judgment.**
>
> *CCD Health*

Human Enablement

- From the outset, the goal was not to replace staff, but to relieve them of the cognitive burden of manual scheduling tasks. AI was positioned as an assistive partner—handling repetitive steps, verifying insurance or eligibility, and surfacing next-best appointment options—so that agents could spend more time listening, reassuring, and problem-solving with patients.

Key Outcomes

- Framing AI as an assistant, not a judge, increased adoption.
- Early, open communication about privacy reassured both agents and patients.
- Scheduling efficiency for an imaging center resulted in 15.8% more calls per hour and 15.7% more appointments per hour.

AI Adoption in Action – Lessons Learned

Learning from Early Adopters

No AI implementation is flawless on day one. Across every industry, contact centers have discovered that while artificial intelligence can automate tasks and amplify insight, its success depends on *how well humans and technology learn together.* Each tool — from co-pilots to predictive routing — brings both promise and pitfalls.

The following section distills lessons from early adopters and real-world deployments of AI in the contact center. It highlights the most common challenges, risks, and patterns of success observed across six core AI capabilities.

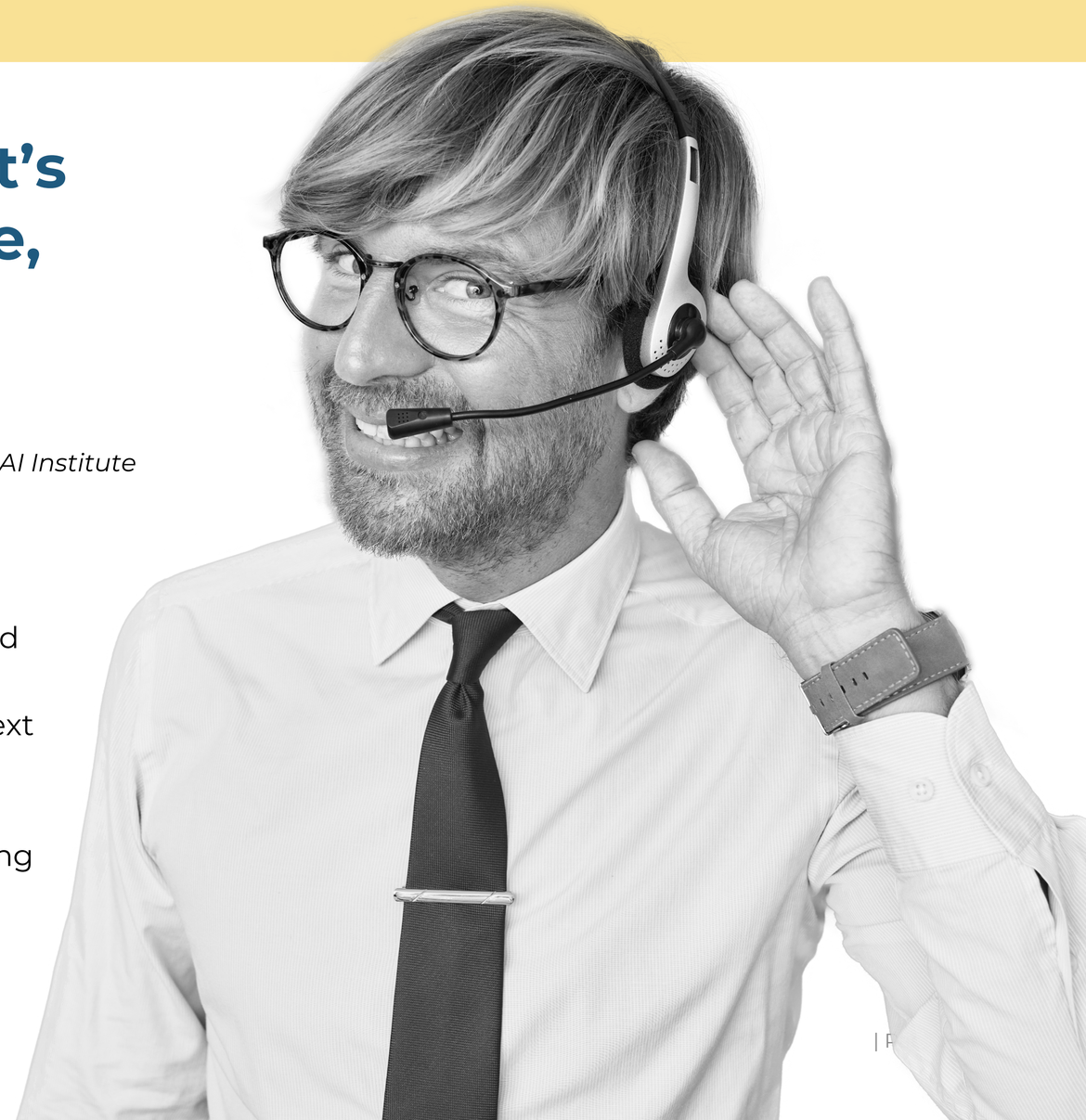
AI Tool	Common Challenges/Risks	Lessons Learned
AI Co-Pilot (Real-Time Guidance for Agents)	• Incorrect suggestions in live interactions • Over-reliance — agents may stop thinking critically • Distracting pop-ups/cognitive overload • Misaligned tone with brand/customer experience standards • Data access risk if not permissioned correctly	• Co-pilot should guide, not dictate — humans make final decisions • Start with low-risk use cases (knowledge surfacing, not scripting empathy) • Train agents to validate suggestions, not follow blindly • Continuously fine-tune tone, content, and workflows based on agent feedback • Apply “least-access” data permissions
AI Agent Assist (Process Automation + After-Call Support)	• Agents misuse or ignore prompts • System incorrectly summarizes or misses details • Poor integration causes duplicated notes or errors • Resistance from veteran agents who prefer manual control	• Automate low-value tasks (notes, knowledge lookup) first • Allow agents to accept, edit, or reject AI-generated summaries • Use analytics from Agent Assist to guide coaching — not penalize • Celebrate agent stories where AI reduced stress or error
Auto QA	• Mis-scoring in general, and emotional or complex calls specifically • Bias in scoring models or speech recognition errors • Perceived as punitive rather than developmental • Lack of trust if results can’t be contested • Perception that AI is “monitoring” rather than supporting	• Combine AI scoring + human calibration • Use QA insights to coach, not punish • Communicate clearly: what’s scored, how data is used • Audit regularly for fairness and accuracy • Frame as “support tool,” not “surveillance”
AI Chatbots / Virtual Agents	• Poor escalation to live agent • Scripted or insensitive responses during emotional topics • Knowledge base out of date leads to wrong answers • Customers get stuck in loops	• Provide “escape to human” option early and clearly • Train bots on empathy and safety language • Maintain a single source of truth for knowledge • Track containment AND satisfaction
Workforce Optimization (WFO + AI Forecasting)	• Over-automation leads to inflexible schedules • AI forecasts fail during unpredictable surges • Agent burnout if only efficiency is optimized • Skill data is outdated or wrong	• Combine AI with supervisor judgment • Include well-being metrics (adherence + burnout) • Maintain accurate skill profiles • Keep “human override” options
Predictive Routing	• Bias in historical data affects fairness • Black-box routing — agents don’t understand why calls go where • Wrong match increases handle time or escalations • Over-optimized for efficiency vs. empathy	• Keep routing logic transparent • Monitor for fairness across agent groups & customer segments • Use FCR, CSAT, and sentiment to validate routing success • Allow manual overrides

AI Adoption in Action – Cross-Functional Lessons Learned

1. **Human-in-the-Loop is non-negotiable:** Every AI touchpoint needs a clear point of human accountability.
2. **Transparency builds trust:** Agents, coaches, and leaders must understand what AI is doing and why.
3. **Data quality drives credibility:** Poor inputs lead to poor insights — clean data before scaling AI.
4. **Change management matters:** Resistance is often cultural, not technical — involve people early.
5. **AI performance ≠ human experience:** Measure both operational and emotional outcomes.
6. **Governance must evolve:** Ethical, privacy, and fairness reviews should be ongoing, not one-time.
7. **Continuous learning loop:** Feed lessons from QA, chatbots, and agent assist back into model tuning.

“There’s nothing artificial about AI. It’s inspired by people, created by people, and it has to be guided by human values.”

Dr. Fei-Fei Li, Co-Director of Stanford’s Human-Centered AI Institute



Turning Lessons into Leadership

Every challenge uncovered through AI adoption reveals an opportunity to lead with greater foresight, empathy, and integrity. The most successful contact centres treat these lessons not as setbacks, but as design principles for the next phase of transformation.

By combining data-driven insight with human judgment — and by embedding accountability, transparency, and continuous learning into every system — organizations can move beyond experimentation to sustainable excellence.

The People Side of AI in Contact Centers

Despite its promise, AI adoption often falters on the human front. Agents may distrust automated scoring, supervisors may feel overwhelmed by analytics, and customers may bristle when interactions feel impersonal. To succeed, leaders must deliberately weave *trust, transparency, and training* into every phase of adoption.

Ask your leadership team:
If our customers could feel one thing after every interaction — what would it be? How will AI help us deliver that, not dilute it?

Three truths to anchor every AI initiative:

1. **AI amplifies intent** — it reflects the culture and ethics of the people who deploy it.
2. **Human connection remains the differentiator** — especially when customers are anxious, ill, or frustrated.
3. **Adoption is emotional before it's technical** — people must feel safe before they can perform differently.

Klarna's Story (www.klarna.com)
Between December 2022 and December 2024, Klarna cut 40% of their workforce -- from 5,527 people down to 3,422. The CEO proudly announced that AI was doing the work of 700 customer service agents. Wall Street loved it.

Then something inconvenient happened. They started hiring again. Turns out customers actually want to talk to humans when their payment gets declined at checkout or their refund goes missing. Quality issues piled up.

AI was excellent at answering simple questions but fell apart when things got complicated or required empathy.

The People Side of AI in Contact Centers

Building Trust, Skills, and Confidence in an AI-Enabled World

AI may change how work gets done — but people decide whether that change sticks. In every successful transformation, trust and transparency are the currency of adoption. Agents must feel empowered. Leaders must model curiosity. Customers must sense continuity.

The people side of AI is about psychological safety, continuous learning, and leadership storytelling. When done well, technology becomes a source of confidence, not fear.

From Fear to Familiarity

Fear is the most common barrier to adoption. Agents often ask: *“Will AI replace me?” “Who’s watching what I say?” “Can it get me in trouble?”*

These are not technical questions — they’re human ones. Leaders must address them early, often, and honestly. Trust begins with clarity.

- → Explain what AI is for (assistance, consistency, learning) and what it is not for (discipline, micromanagement).
- → Make AI visible and explainable: offer demos, open forums, and feedback loops. Show real examples of how AI improves workflow or reduces workload.
- → Be transparent about what data is captured, how it’s used, and who has access.
- → Lead with empathy: *“We’re exploring AI to help you do your best work — not to take it away.”*
- → Share early wins publicly and failures privately.

“Trust comes from transparency and control. It’s really hard to trust something that you don’t understand.”

Clem Delangue
Co-founder of Hugging Face

Redesigning Roles for the AI-Enabled Agent

In an AI-enabled contact center, roles evolve. Agents become knowledge navigators, supervisors become data interpreters, and QA analysts become insight coaches. The new workforce blends emotional intelligence with digital literacy.

“AI won’t replace humans — but humans with AI will replace humans without AI.”

Karim Lakhani
Harvard Business Review

Core Skill Areas for the AI-Enabled Workforce:

- → **AI Literacy:** Understanding what AI does (and doesn’t do).
- → **Critical Thinking**: Verifying AI recommendations and exercising judgment.
- → **Emotional Intelligence:** Maintaining authenticity in AI-assisted communication.
- → **Data Curiosity:** Using dashboards and insights to inform service decisions.
- → **Adaptability:** Embracing iteration and feedback as a constant.

Traditional Role	Emerging Role	New Core Competency
Agent	AI-Enabled Agent	Interpreting AI suggestions, maintaining authenticity
Supervisor	Coach-Analyst	Translating data into developmental feedback
QA Analyst	Insights Partner	Connecting analytics trends to human behavior
Trainer	Enablement Designer	Creating adaptive, data-informed learning
CX Leader	Experience Orchestrator	Balancing automation, empathy, and trust

Reinventing Coaching in the Age of AI

AI tools like Auto-QA and Agent Assist are transforming how performance is measured and supported. Instead of scoring a small sample of calls, leaders now have access to 100% interaction data, real-time behavior insights, and emotion analytics. But data alone doesn't create better agents — ***coaches do***. The opportunity lies in shifting from score-based coaching to growth-focused coaching, where AI serves as the lens and humans provide the learning.

Coaching Techniques That Work in AI-Enabled Contact Centers

→ **Data-Informed Dialogue -** Use AI analytics to uncover behavioral trends (talk time, empathy gaps, hold habits), then ask: *"What were you noticing in that moment?"* instead of *"Why did your score drop?"*

→ **Emotion + Evidence Coaching -** Pair AI sentiment graphs with the actual customer audio: *"See how their frustration dipped when you paused and reassured them? Let's unpack why that worked."*

→ **Continuous Micro-Feedback Loops -** AI-generated summaries allow leaders to switch from monthly performance reviews to 5-minute coaching check-ins after key calls — while the memory, emotion, and learning are still fresh.

→ **Coaching Confidence, Not AI Compliance -** The goal isn't to force agents to follow AI—it's to help them know *when to trust it, when to adapt it, and how to remain human while using it.*

AI Capability	What Changes	How to Coach Differently
Auto QA	You now see every interaction, not just the 'best or worst'	• Given a larger dataset, use AI to identify patterns and trends – not just behavior on a specific interaction. • Start coaching sessions with: *"Here's what's happening most often across your calls…"* instead of *"Your score is 78%."* • With emotional insight, focus on impact on the customer experience.
AI Agent Assist (Real Time Guidance)	Agents receive prompts and knowledge in the moment — yet effectiveness depends on how they respond to them.	• Review where AI prompts were used, ignored, or overridden—ask why. • Celebrate good judgment: *"You didn't follow the AI script here, and that helped the patient feel heard — that's skill."* • Use post-call summaries to create micro-coaching moments (2–5 minutes), instead of waiting for monthly QA reviews.

Why You Need a Vision Before You Deploy AI ~ The AI Adoption Framework

AI is not a tool you install – it's a direction you choose. It represents a strategic shift that alters how people work, how decisions are made, and how customers experience your organization. Without a clear vision and roadmap, AI becomes disconnected experiments instead of meaningful change.

Step 1 – Define the Why

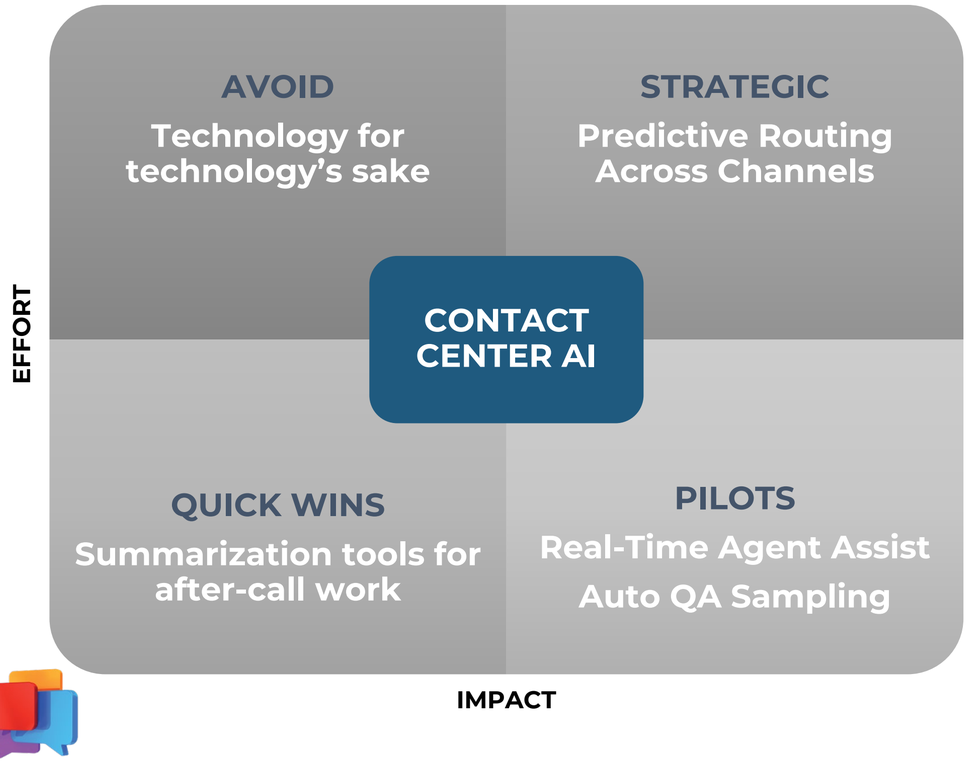
Every successful AI initiative begins with intention. Before evaluating vendors or features, ask: *Why are we doing this? What outcome do we want for customers, agents, and the organization?* Start by reflecting on your **Customer Experience Promise**. If your brand promise is "We Care," then the purpose of AI should be *to help agents care more efficiently,* not to remove caring altogether.

Step 2 – Assess Readiness

Start where you are. Most contact centers underestimate the cultural, data, and process foundations needed for effective AI. Many organizations are "tech-ready" but "people-unready." Address mindset and trust early; it's easier (and less expensive) than fixing morale later.

"Technology changes what's possible. Culture decides what's sustainable."

Microsoft, Satya Nadella



Step 3 – Select the Right Use Cases

Prioritize for impact and effort. Trying to "AI-enable" everything at once guarantees challenges. Instead, begin with two or three use cases that are *painful enough to matter* but *contained enough to manage*.

- **Customer value:** *Does it solve a real customer frustration?*
- **Agent value:** *Does it make work easier or more meaningful?*
- **Business value:** *Does it improve cost, compliance, or consistency?*
- **Risk:** *Can we pilot safely without damaging trust?*

“Technology can automate processes. Only people can earn trust.”

Frances Horner
President, VoC

Step 4 – Build Your Unique Human-in-the-Loop Model

AI performs best when humans remain in the feedback loop – guiding, correcting, and improving the system over time. What role do humans play in your organization’s AI plan?

Define who owns what and set some ethical guardrails:

- ✓ Be transparent about when customers interact with AI.
- ✓ Protect sensitive data; avoid “over-personalization creep.”
- ✓ Maintain an escalation path to a human within two interactions.

AI brings speed, scale, and consistency – but humans bring **context, conscience, and care.**

A true human-in-the-loop design ensures that at every stage of the AI lifecycle, people remain accountable for interpretation, improvement, and ethical decision-making. Human touchpoints ensure that every AI output is understood, verified, and humanized before it reaches the customer. Technology handles the routine → humans handle the judgment, empathy, and accountability.

Function	AI does this…	Human does this…
Detection	Monitors conversations and data streams to spot issues, keywords, anomalies, or compliance triggers.	Confirms the issue is real, interprets nuance, perspective or sarcasm the AI may miss, and validates priority.
Interpretation	Highlights patterns or correlations within large data sets.	Provides operational context — explains why the pattern matters and identifies its root causes.
Decision Support	Recommends next best actions, routing options, or resolution steps.	Evaluates recommendations for tone, fairness, and practicality before confirming or modifying them.
Communication	Drafts real-time summaries, next-step scripts, or empathy phrases.	Personalizes the message, adjusts tone to fit the customer’s situation, and ensures it reflects brand voice.
Escalation + Intervention	Detects high-risk, emotional, or complex scenarios needing human review.	Decides when to step in directly, takes ownership of the interaction, and resolves with empathy and authority.
Learning + Calibration	Updates models based on new data and usage feedback.	Audits sample outputs for bias or drift, provides corrections, and retrains or tunes models as needed.
Governance & Ethics	Enforces programmed rules for privacy, compliance, and access control.	Conducts periodic governance reviews, documents exceptions, and ensures human accountability is visible.
Continuous Improvement	Surfaces trends or opportunities for optimization.	Converts insights into updated workflows, job aids, and coaching content that close performance gaps.
Innovation & Evolution	Suggests new automations or detects emerging capabilities from data patterns.	Evaluates feasibility, user impact, and ethical implications before green-lighting new AI initiatives.

People fear what they don't understand — and they distrust what they don't see.

Step 5 – Prepare People & Processes

Train for confidence, not compliance. AI adoption fails when people feel replaced instead of empowered. Agents need *skills*; leaders need *stories* that make AI feel personal, not procedural. Focus on three areas:

1. **Awareness and Mindset** — demystify AI; emphasize benefits for agents and customers
2. **Skill Development** — teach practical use of AI tools, interpreting data, ethical decision-making.
3. **Workflow Redesign** — integrate AI outputs into QA, coaching, and escalation paths.

Sample learning objectives:

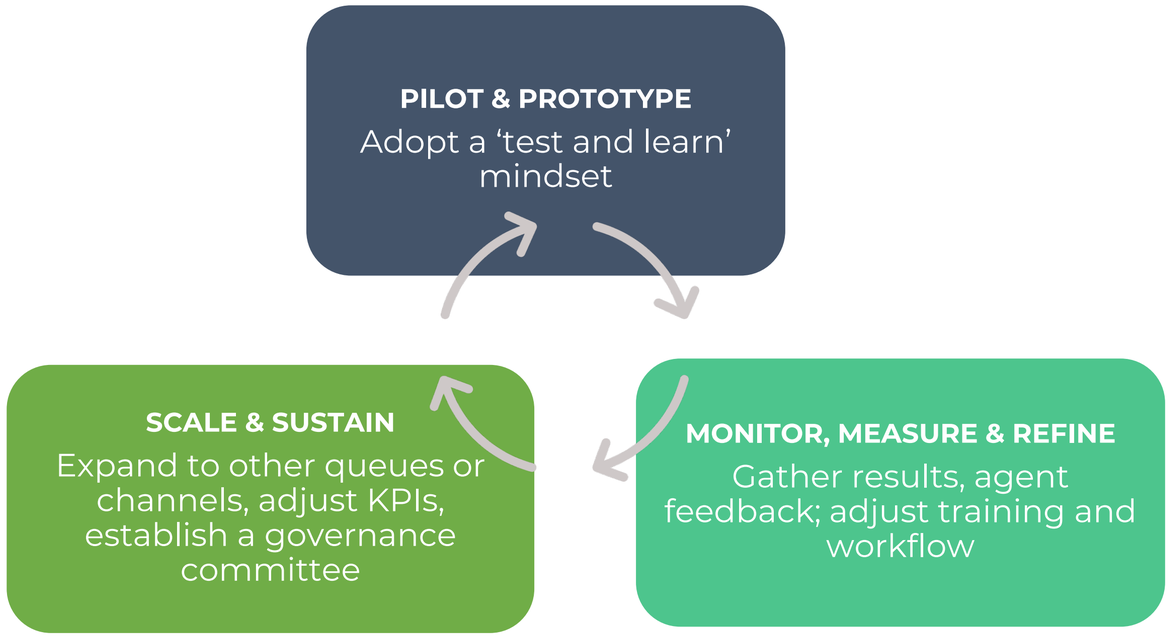
- ✓ Recognize where AI assists vs. where human empathy prevails.
- ✓ Use AI insights to personalize reassurance and problem-solving.
- ✓ Calibrate AI feedback with judgment during coaching.
- ✓ Customize AI recommendations to align specifically with customer requests.

Step 6 – Implement, Monitor & Iterate From Pilot to Performance

Implementation should feel evolutionary, not revolutionary. Start small, learn fast, and scale responsibly.

Key Metrics to Monitor

- → Customer satisfaction improvement
- → Customer effort scores
- → Quality assurance improvement
- → Adoption rate (% agents actively using tools)
- → Assist engagement rate (how often AI suggestions are applied)
- → Accuracy and error rates
- → Employee engagement scores



“The most successful AI projects start as empathy projects — and end as culture transformations.”

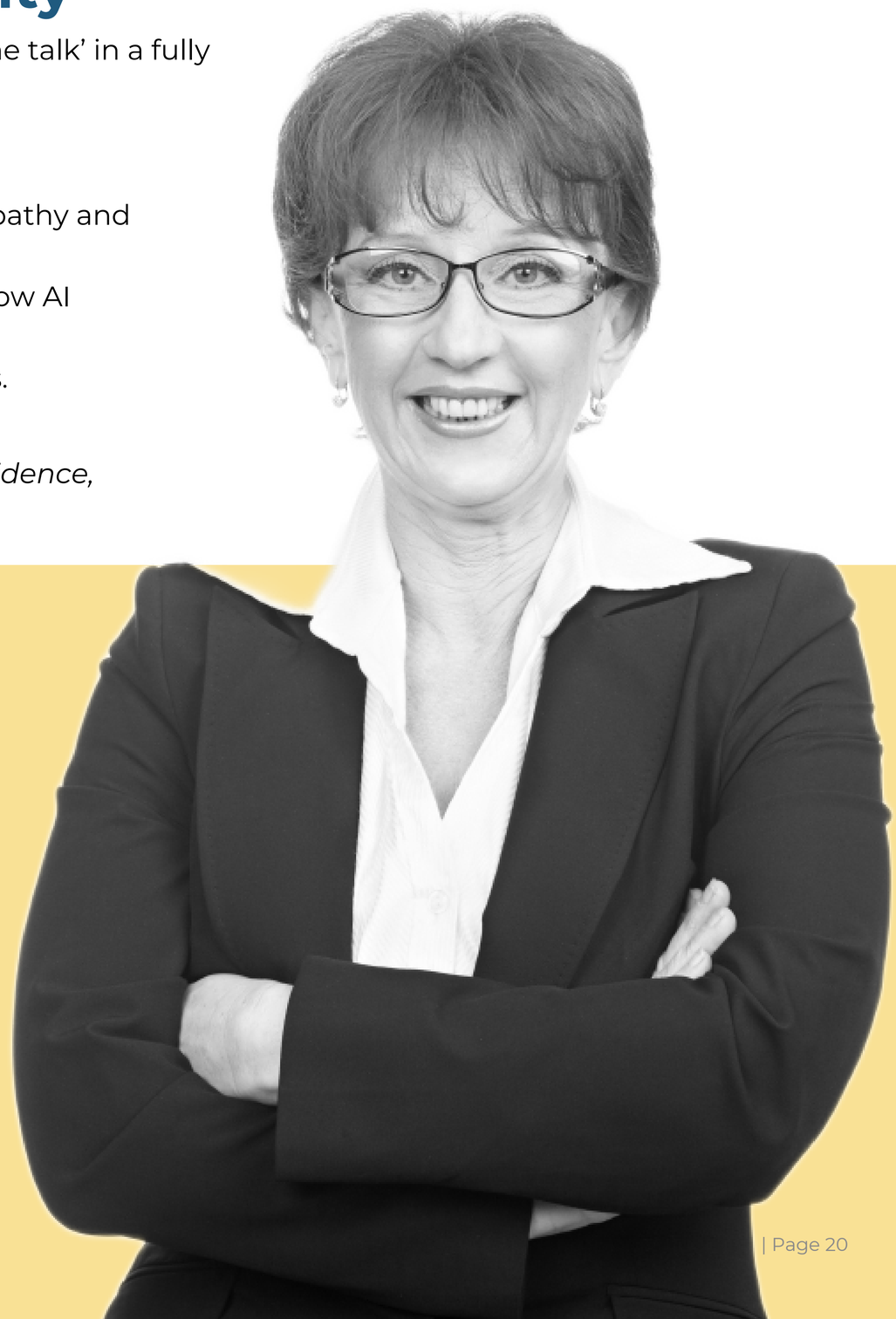
Sharon Oatway, Chief Experience Officer, VereQuest

Lead with Empathy, Model with Curiosity

Any technology adoption starts with a leadership example. When leaders ‘walk the talk’ in a fully transparent manner, they send a powerful message: *learning is for everyone*.

Across industries, the key success factors for any AI initiative are clear:

1. **Clarity of Purpose** — Each organization started with a “Why” anchored in empathy and service, not savings alone.
2. **Human Partnership** — Agents and supervisors were involved early, shaping how AI interacted with their work.
3. **Incremental Rollout** — Small pilots built trust faster than top-down mandates.
4. **Training as Culture** — Learning didn’t end at go-live; it became continuous.
5. **Balanced Metrics** — Success was measured not just by efficiency, but by *confidence, connection, and customer outcomes*.



In the world of AI-enabled service, success is no longer measured only in seconds and savings. The most forward-thinking contact centers now evaluate their performance in three dimensions: operational efficiency, human experience, and customer trust.

Perspective	Key Questions	Sample Indicators
Customer	*Are we easier to do business with?*	Effort score, repeat-contact rate, sentiment trend
Employee	*Do people feel empowered by AI?*	Agent trust index, training completion, adoption rate
Process	*Are we using AI effectively?*	Assist utilization, QA coverage, model accuracy
Financial	*Are we achieving ROI responsibly?*	Cost per contact, revenue per resolution, retention lift

Engaging an AI Enablement Partner – like VereQuest

Taking your first steps with AI shouldn't require a leap of faith.

VereQuest helps you minimize risk, build trust, and equip your teams to confidently adopt AI in ways that elevate **empathy**, **efficiency**, and the **overall experience**—for both customers and teams. We help organizations bridge the gap between *AI capability* and *human confidence*.

Our expertise lies in combining **customer experience strategy, QA insight, and learning design** to create meaningful, measurable adoption.

Our Philosophy:
AI doesn't replace the human connection — it *requires* it.

We can help you:

- ☐ Prioritize AI opportunities and point you in the right direction.
- ☐ Evaluate vendors and map technology to people and processes.
- ☐ Redesign QA and coaching frameworks to integrate AI analytics.
- ☐ Provide extra hands for human-in-the-loop support.
- ☐ Design, pilot, and roll out new initiatives.
- ☐ Develop customized, customer-centric e-learning for agents, supervisors, and coaches.
- ☐ Understand what a new, AI-enabled customer journey looks like.
- ☐ Conduct readiness and cultural assessments.
- ☐ Facilitate executive and frontline alignment workshops.
- ☐ Build AI literacy and enablement training.
- ☐ Provide training and support for human-in-the-loop integration.
- ☐ And more.

"AI is not a project with an end date – it's a partnership with a learning curve."

Sharon Oatway
VereQuest

At VereQuest, we bring over two decades of experience helping contact centers deliver better customer experiences and create workplaces where employees feel supported, confident, and valued.

For more information:

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APPENDIX 1 – Glossary of Key Terms

A shared vocabulary builds shared understanding. Here are concise definitions to ground your team's conversations:

Term	Definition
Agent Assist	A tool that supports agents in real time during a call or chat — suggesting answers, reminders, or next steps, while the human stays in control of the conversation.
Agentic AI	Advanced AI that autonomously performs tasks or decisions under defined parameters – without human prompting.
AI Co-Pilot	An intelligent assistant that works alongside contact center agents in real time, not only suggesting information or next-best actions, but also helping complete tasks such as summarizing calls, filling out forms, updating systems, or generating responses – but the human stays in control.
Algorithms	Step-by-step instructions or rules that computers follow to solve a problem or make a decision. In AI, they help machines "learn" from data.
Analytics	The process of collecting and studying data (like call times, customer satisfaction, or sentiment) to understand what's happening and make better decisions.
Artificial Intelligence	Artificial Intelligence is a field of technology that enables machines to mimic human cognitive abilities — such as understanding language, learning from experience, reasoning through information, and making predictions or decisions. Unlike traditional software, which only follows predefined rules, AI can improve over time by analyzing data, recognizing patterns, and adjusting its responses based on outcomes. The more accurate definition of AI in contact centers is augmented intelligence – a partnership between people and machines that expands what both can achieve.
Auto QA	Automated quality assurance that uses AI to evaluate interactions for accuracy, compliance, and tone. Also referred to as 'speech analytics'.
Chatbot	A computer program that interacts with customers — answering common questions or handling simple tasks without a human agent.
Ethical AI	The practice of designing and using AI systems that are fair, transparent, and accountable.
Generative AI	AI that can create new content (text, summaries, suggestions) based on learned patterns.
Generative Knowledge Search	Used natural language to instantly find, summarize, and present the most relevant information from across multiple systems or knowledge bases.
Human-in-the-Loop	A design principle ensuring human oversight and feedback in AI decision-making.
Model Drift	Gradual loss of AI accuracy due to changes in language, data, or process context.
Predictive AI	A type of AI that uses past data to make educated guesses about what will happen next — like forecasting call volume or which customer might need help.
Predictive Routing	AI that matches a customer to the best available agent based on things like personality, skill, past interactions, or likelihood of solving the issue quickly.
Quality Assurance	A process used in contact centers to make sure agents are handling customer interactions in a manner that aligns with the company's brand promise—checking accuracy, professionalism, empathy, and adherence to company standards.
Sentiment Analysis	The use of AI to detect emotion, tone, or satisfaction in customer communication.
Speech Analytics	See Auto QA
Workforce Optimization (WFO)	Tools and processes that leverage historical data to help schedule the right number of agents at the right time, track performance, and improve productivity.

APPENDIX 2 – Recommended Reading & Industry Resources

Stay curious – the AI contact center landscape evolves daily. Below are sources we recommend for continued exploration and best practices.

Area	Resource	Why?	Link
Contact Centers	**The AI-Powered Contact Center** — CCW Market Study (July 2024)	AI promises to radically transform customer engagement, but what does that mean for your contact center strategy?	https://www.customercontactweekdigital.com/ai-for-cx/whitepapers/2024-july-market-study-ai-powered-contact-center
Contact Centers	**How AI Will Transform Customer Service** — Forrester/Talkdesk	Forrester found that four in 10 contact center decision makers are exploring artificial intelligence technologies to differentiate their services. Are you one of them? Should you be?	https://www.talkdesk.com/resources/reports/how-ai-will-transform-customer-service/
Contact Centers	**State of Service** — Salesforce	Highlights insights from a survey of 6,500 service professionals regarding AI adoption, challenges, and the collaboration between humans and AI agents.	https://www.salesforce.com/resources/research-reports/state-of-service/
Contact Centers	**The Human Side of Generative AI** — McKinsey	The number of employees who use generative AI is expected to soar, freeing many to focus on higher-level cognitive work. Can organizations use this moment to make jobs more people centric?	https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/the-human-side-of-generative-ai-creating-a-path-to-productivity
Contact Centers	**Speech Analytics State of the Industry Report** — CallMiner	Generative and agentic AI are no longer experiments for most customer experience (CX) leaders. That said, while AI adoption is making quick gains, this year's report also reveals that organizations are still struggling to manage those investments with proper governance structures.	https://callminer.com/blog/callminer-2025-cx-landscape-report-highlights-ais-rapid-growth-despite-governance-gaps
Banking	**How Banks Can Supercharge Intelligent Automation With Agentic AI** — Deloitte	AI agents are an emerging frontier in banks' AI journey, but deploying agentic AI in banking may need fresh thinking and a fundamental redesign of existing processes and workflows.	https://www.deloitte.com/us/en/insights/industry/financial-services/agentic-ai-banking
Retail	**AI in Retail: How artificial intelligence is transforming CX** — Zendesk	When businesses harness AI in retail, they provide more effective service and boost customer loyalty. Learn how you can use this technology to impress your customers.	https://www.zendesk.com/blog/retail-ai/
General	**Human + Machine: Reimagining Work in the Age of AI** —Accenture	A leading guide on human-AI collaboration, including contact center workforce implications.	https://www.accenture.com/ca-en/insights/technology/human-plus-machine
General	**Generative AI Success in the Contact Center Starts with Knowledge Management** — Harvard Business Review	The report will describe the benefits, requirements, risks, and best practices that those executives should take into account to let gen AI provide self-service and assisted service to improve contact center efficiency and provide an improved experience not only for customers but also for customer service agents.	https://hbr.org/sponsored/2024/12/generative-ai-success-in-the-contact-center-starts-with-knowledge-management

ABOUT US

For more than two decades, VereQuest has helped contact centers across North America deliver service that is both high-performing and deeply human. VereQuest combines expertise in quality assurance, coaching, training, and customer experience strategy to build contact centers where people — customers and employees — feel heard, supported, and valued.

Today, as AI reshapes the future of service, VereQuest helps organizations adopt new technologies with confidence by ensuring they enhance empathy, not replace it. From QA program design and agent coaching to AI readiness, training, and human-in-the-loop governance, VereQuest provides practical guidance that connects operational performance with human impact.

Our work is grounded in one belief: great service isn't an outcome of technology — it's the result of humans using technology well.

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