



# Harnessing the Power of AI:

4 Steps to Success  
for Contact Centres



# Building a future-ready contact centre



With all the hype about foundational models like ChatGPT and Generative AI disruption, you'll be excused for wondering whether it's worth making changes to your contact centre operation now to take advantage of it, to wait, or where to start. This white paper will help you make sense of it all, explaining how to apply the new tech where it makes sense, in a way where you'll have the most to gain.

Despite daily announcements about coming benefits and risks of the newest AI, the bulk of the basic techniques for building a data-enabled contact centre still apply. Our four steps will help you understand where to start first, how to assess what tech tools mix will best serve your organisation's goals and where AI can play a role.

**For a glossary of AI-related terms go to page 7**

# 4 Steps to Success

## Step

# 1

## Snapshot your current state

If you don't know your starting point, you won't understand your big challenges in enough depth to strategise fitting solutions.

### 1. Query your data

Today's Speech-to-Text (STT) capabilities open a whole new realm of possibilities when it comes to analysing old call recordings. Instead of sampling only a fraction of calls manually, you can now gain full insight into what customers most frequently ask for, along with how they ask for it and the corresponding agent responses as well. Developments in tech, including the right application of Large Language Models (LLMs), mean you can now automate the bulk of categorisation and labelling work, while knowing the words and phrasing your customers use means you can train your narrow Natural Language Processing (NLP) for better recognition. LLMs are great at figuring out alternate phrasings, so you can further improve your recognition rates. The downside of using Generative AI on its own to answer questions is that its responses are unpredictable and not always rooted in fact.

### 2. Understand the issues

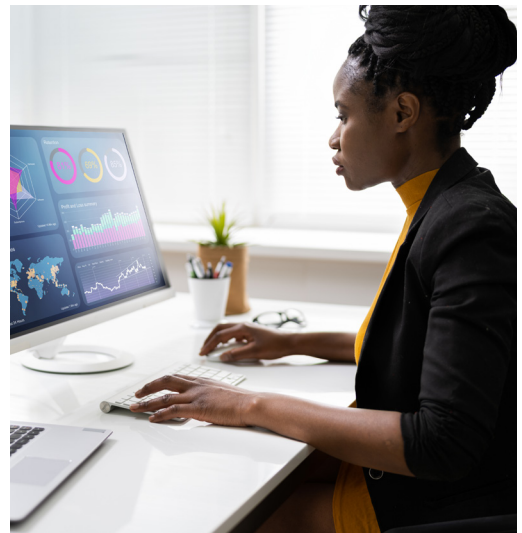
You might already have some ideas about what your biggest challenges are but check if your new data backs this up and quantify it.

### 3. What are your goals?

Solving challenges is a great starting point, but what other goals do you have as an organisation and what will be your North Star when it comes to prioritising action? Once you understand what you want to achieve, you can select the technology mix that will deliver that experience to your customers and employees.

### 4. How will you measure success?

Pick your metrics first and establish your baseline so you can check back regularly to manage progress.



## Step

# 2

## Tackle first things first

It may seem counterintuitive, but your real starting point should be informed by solid data and discussions. Yes, laying the groundwork is necessary, but now is when real work begins.

### 1. Automate the easy

While it may feel tempting to take on everything at once and speed up your success, that's not the way to get the most out of automation. Find a narrow use case – preferably one that's high volume or high value – and automate that work. This may mean building a chatbot to handle it, using Robotic Process Automation (RPA) for a process, or a combination of the two (along with Optical Character Recognition (OCR) or image recognition where it makes sense). Do that well, refine, use the learnings, and apply them to the next use case. LLMs can be applied to auto-generate flows that provide responses trained on your data. Remember to mitigate the risk of hallucinations in post-processing and keep a human in the approval loop. You won't want to relinquish control of your responses and take on risk of public relations and regulatory disasters.

### 2. Authenticate

Breaking the rule about not solutioning before understanding the problem, if identity and verification (ID&V) is part of the bulk of your customer interactions, you should be offloading that work from your agents. Cumulatively this will produce huge time savings and quite frankly technology handles this for your customers faster, easier and more securely.

### 3. Banish IVR

If you're still forcing customers to sit through your list of instructions and guess at your tree structure, stop it now. Trying to make them classify their issues based on your organisational structure is an annoyance for them. On top of that you're incurring losses due to double work when they find their way to the wrong department. Intelligent Routing helps eliminate double work and minimise customer frustration going into a call.



## Step

# 3

## Build for outcome

One of the big mistakes companies make when implementing chatbots is believing that building basic FAQ bots will relieve pressure on their contact centres. What they fail to recognise is that most customers don't make contact for general information, they're fundamentally trying to achieve an outcome. Here are some ways to make the in-system connections that deliver results:

### 1. **Re-examine your routines**

Particularly under the pressure of the pandemic, companies were forced to quickly digitise their processes to fit the constraints of our new circumstances. Now it's time to go back and digitalise work, ensuring the process takes advantage of opportunities afforded by technology.

### 2. **Don't ask what you already know**

Check your silos. Customers hate re-explaining themselves, so why ask them to repeat information you already know about them, even if it is in a different part of the organisation? Conversational AI is great at de-siloing information by only accessing the input you need at that moment. It's fine to ask customers to confirm that nothing has changed, just don't assign them form-filling busywork instead of helping them. What other information can you capture? There's a lot of input available to you based on phone number and device details, contextual information, or account history. Look to reduce steps for your customer, anticipating their needs, and delivering a more enjoyable experience with quicker outcomes.

### 3. **Handhold**

Help customers take the right actions to achieve their goals, step by step. Well-built processes don't need to collect information in a specific order and can remind users of what's still missing. LLMs handle longer, more complex requests better than NLP models in general. Many Conversational AI platforms and tools now include ChatGPT integration points, so test to see if it makes better sense of complex requests than what you're currently using.

### 4. **Analyse and refine**

Conversational AI generates and builds on data by default; and it also enables continuous, light-touch analysis that uncovers actionable insights. Using pre- and post-processing techniques enables safe use of LLMs in analysis. They can be used to handle Personally Identifiable Information (PII) masking up front, allowing you to train on your organisation's own data, then check in post for hallucination detection and elimination.



## Step

# 4

## Help agents help you

It's a tough job and agent attrition is a big problem, so let's look at what you can do to make their life a bit easier.

### 1. Assist in assistance

Up front or behind the scenes, adding bots the right way can lighten agent workload. Agent Assist technologies empower agents with the information they need to help customers, shortening their training and response time, while increasing their performance and job satisfaction. LLMs can provide content and make Next Best Action (NBA) suggestions. It's safer keeping a human in the loop instead of risking unmediated contact with customers, so make sure you require an approval step.

### 2. Don't send them in blind – summarise, surface, sentiment

Most customers expect agents to know who they are and be aware of any previous interactions. Empower them with a handover that includes transcripts, summaries, and highlights so that customers don't have to repeat themselves. Adding sentiment analysis helps agents respond in the most appropriate tone for the customer mood.

### 3. Tag team – calculate, collect, connect

Efficient experiences take a tag-team approach where bots collect information or connect to calculators when customers need help. The bot can use this to get them part-way to their goal before bringing in an agent to finish. Agents aren't left on their own, they continue to receive assistance from bots to help customers reach their goals.

Here's another place where LLM's ability to understand more complex requests can be employed. It's a good idea to check understanding and give users the ability to amend the received interpretation, but that's true regardless of the underlying language model employed.

### 4. Facilitate agent influence

Agents work on the front lines and have the deepest insight into where business processes are going wrong. Enable them to improve their workplace, while shortening handling times and providing a better total experience. Importantly, keep a human in the loop and reassure agents they will not be replaced by bots. Becoming a bot trainer could even be an attractive career progression opportunity.

Transforming your contact centre to meet increasing customer demands without breaking your business case isn't an overnight endeavour, but it is doable, and it is worth doing. The positive impact on your customer and employee experience will make the effort worthwhile and will pay dividends in terms of customer advocacy and brand reputation, not to mention all the time and cost savings that come with automation.

To discuss any of these four steps further or to find out about the latest thinking, feel free to contact us for more insights.

# Glossary

- **Artificial Intelligence (AI):** The ability of machines or computer systems to perform tasks that typically require human intelligence, such as learning, problem-solving, and decision-making.
- **Chatbot:** A computer program or AI application designed to simulate human conversation through text or voice interactions, traditionally used for customer service or information retrieval.
- **ChatGPT:** A chatbot built on OpenAI's foundational language model GPT (Generative Pretrained Transformer). Probably the most well-known text generative AI, ChatGPT is trained on a wide range of internet text and can generate human-like responses given input prompts.
- **Conversational AI:** Enables computers to engage in natural and human-like conversations with users, utilising techniques like NLP and machine learning. It facilitates interactive and intuitive communication.
- **Foundational Model:** A very large language model (LLM) that can be used to generate new content.
- **Generative AI:** This involves using AI techniques to create new and original content, such as images, text, and music, based on patterns learned from existing data. It enables machines to generate realistic outputs that mimic the characteristics of the training data.
- **Machine Learning (ML):** A subset of AI that focuses on developing algorithms and models that enable computers to learn and improve from data without being explicitly programmed.
- **Large Language Model (LLM):** Both Generative AI and the foundational models are LLMs, but they can be smaller or private instances. Trained on enormous amounts of text but then tend to require little training to complete tasks like summarisation, text completion, translation and question answering. Can be fine-tuned.
- **Narrow NLP:** This is what Conversational AI has been built upon. It provides control over responses that generative models cannot and though it requires more training. It can be used together with LLM where it makes sense, for example, to help improve intent recognition.
- **Natural Language Processing (NLP):** The branch of AI that focuses on the interaction between computers and human language, enabling computers to understand, interpret, and generate human language. NLP encompasses everything from traditional narrow NLP chatbots to ChatGPT, LLM and Generative AI.
- **Robotic Process Automation (RPA):** This is a software robot that mimics human actions to perform tasks such as data entry and transaction processing, leading to increased efficiency. Unlike AI, RPA is a rule-based software that has no intelligence and automates repetitive tasks. RPA does not require extensive coding or integration with existing systems.



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Email [cheryl.allebrand@cgi.com](mailto:cheryl.allebrand@cgi.com)

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