

Beyond POC:

How to adopt AI agents for success

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- **Pulse check: state of CX AI adoption today**
 - Top use cases
 - Why 80% of AI pilots are failing
- **The breakdown: AI agents for CX**
 - CX AI agents overview
 - Exploring reactive vs. proactive agents
- **Preparing for success**
 - Top barriers to AI adoption
 - Steps to take NOW to overcome barriers
 - Questions to ask CX AI vendors



State of CX AI adoption today



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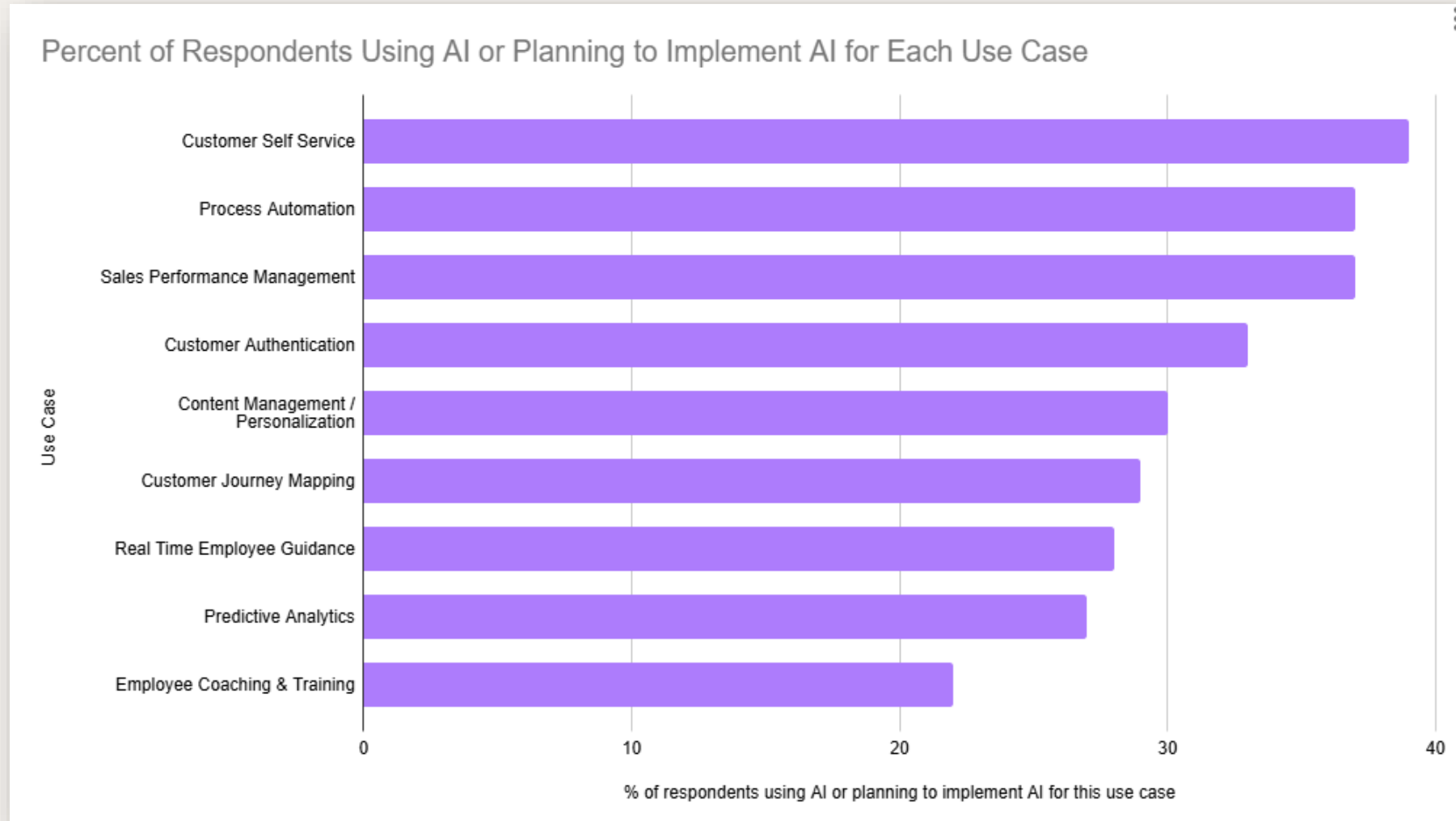


What's on YOUR mind?

What are your most pressing business challenges that you hope to solve with the help of AI agents?

- Streamlining operations to enhance efficiency
- Boosting customer satisfaction and engagement
- Reducing costs and optimizing resource allocation
- Gaining deeper insights from complex data

How CX AI decisionmakers are leveraging AI



What we've observed at NiCE

1T

AI tokens used in
the past year

500M

AI-powered
interactions per
month

100+

Customers live with
AutoSummary in
2024

44+

Autopilot (IVA)
customers live as
of Fall 2024

225

Customers went
live with AI
solutions in 2024



A staggering 80% of AI pilots fail. Why?

1

Unclear success metrics

Solution:
Work across business units or teams to align AI project success metrics to business KPIs.

2

Lack of AI-ready data

Solution:
Invest now in your data practice. A CX platform with a common data model makes this possible.

3

Implementing technology, not solutions

Solution:
Look for solutions that leverage AI strategically, to solve the business problems you need to solve

4

Inadequate infrastructure

Solution:
Partner with vendors that can navigate the build-vs-buy issue & leverage external resources & experts

5

AI misuse

Solution:
Identify use cases that support your business goals; look for solutions proven in these use cases.



CX AI agents: a breakdown



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Contact center AI agents: what's out there?

For customers	<ul style="list-style-type: none">• Provide 24/7 support through self-service• Resolve customer issues conversationally, with integrations to other business systems
For agents	<ul style="list-style-type: none">• Guide agents with relevant, contextual answers• Assist with or offload repetitive manual processes like notetaking
For supervisors	<ul style="list-style-type: none">• Show supervisors where to focus to achieve KPIs• Provides both time-sensitive, real-time alerts and guidance for ongoing training & improvement
For CX leaders	<ul style="list-style-type: none">• Helps CX leaders identify service gaps• Provides insight into the overall CX operation and, ideally, suggestions/strategies for how to improve service & efficiency
Operational	<ul style="list-style-type: none">• Carry out workflows and tasks across business systems• Offload complex or tedious, manual, behind-the-scenes processes



AI agents: reactive vs. proactive

Use a **reactive** AI agent if you want to...

- Unburden your contact center
- Reduce contact center OpEx
- Allow customers to self-solve and get help 24/7
- Cast a wide support net to contain & deflect a range of customer intents

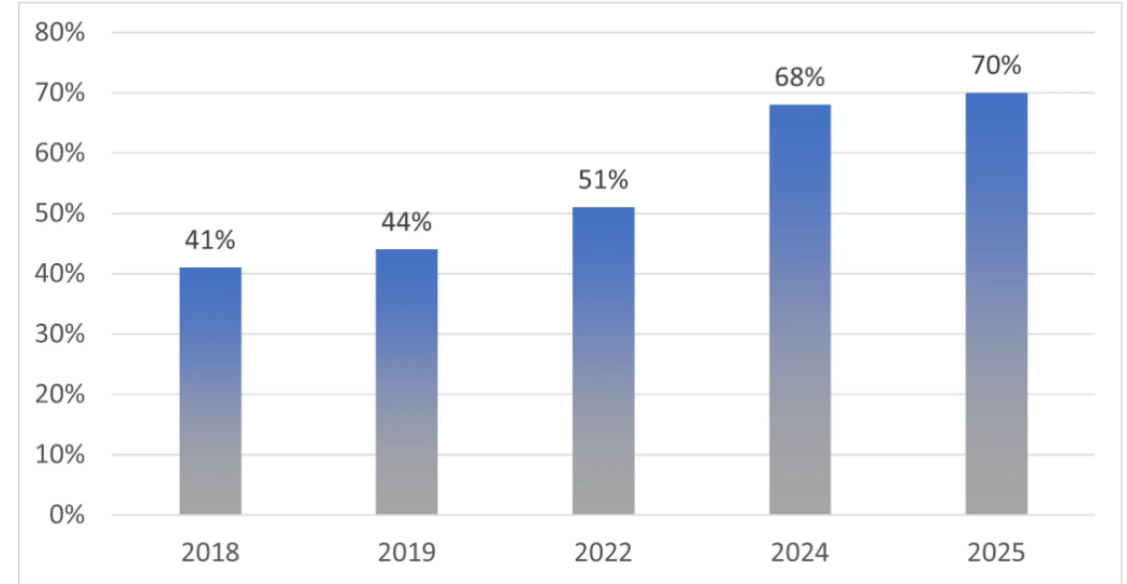
Use a **proactive** AI agent if you want to...

- Engage more of your customers to achieve specific business goals
- Get customers who meet [X] criteria to do [Y]
- Drive revenue and conversion
- Reduce OpEx caused by specific, costly events
(including events outside the contact center such as truck rolls, missed appointments, etc.)

State of proactive service

In 2020, Gartner predicted that **by 2025, proactive customer interactions would outnumber reactive customer interactions.**

However, the current state of service lags behind this prediction.



Percent of businesses using proactive engagement

N=431

Source: Aberdeen



What does
that look
like in
action?



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reactive AI in action

- Implemented **reactive AI agent (Autopilot)** to offer 24/7 self-service across three channels: voice, chat, & SMS.
- Resolves support inquiries around product questions and service requests (PlayStation, etc.)
- With AI-driven intent analysis and intelligent, data-driven self-service, Sony realized:

23%

containment
within just 5 months
of deployment

40%

automation potential
of inbound customer
inquiries



North American financial institution

proactive AI in action

- Implemented **Proactive AI Agent** to follow up with loan applicants over voice and text.
- Proactive, NLU-driven AI carries out a dynamic, multi-touch, multi-channel engagement strategy over days or weeks.
- Within weeks of deployment, observed:

10%

increase
in loan bookings

70%

engagement
rate across all
conversations

7%

faster
sales cycles

- Implemented **Proactive AI Agent** to validate appointments, reschedule, and ensure maximum Patient Care Coordinator (PCC) efficiency.
- Through data-driven context, immediately and accurately identifies the right customers to engage and communicates with them simultaneously, taking actions on their behalf to realize:

20%

reduction
patient no-shows

10%

reduction
provider no-shows

30%

increase
weekly order output



Preparing
for success



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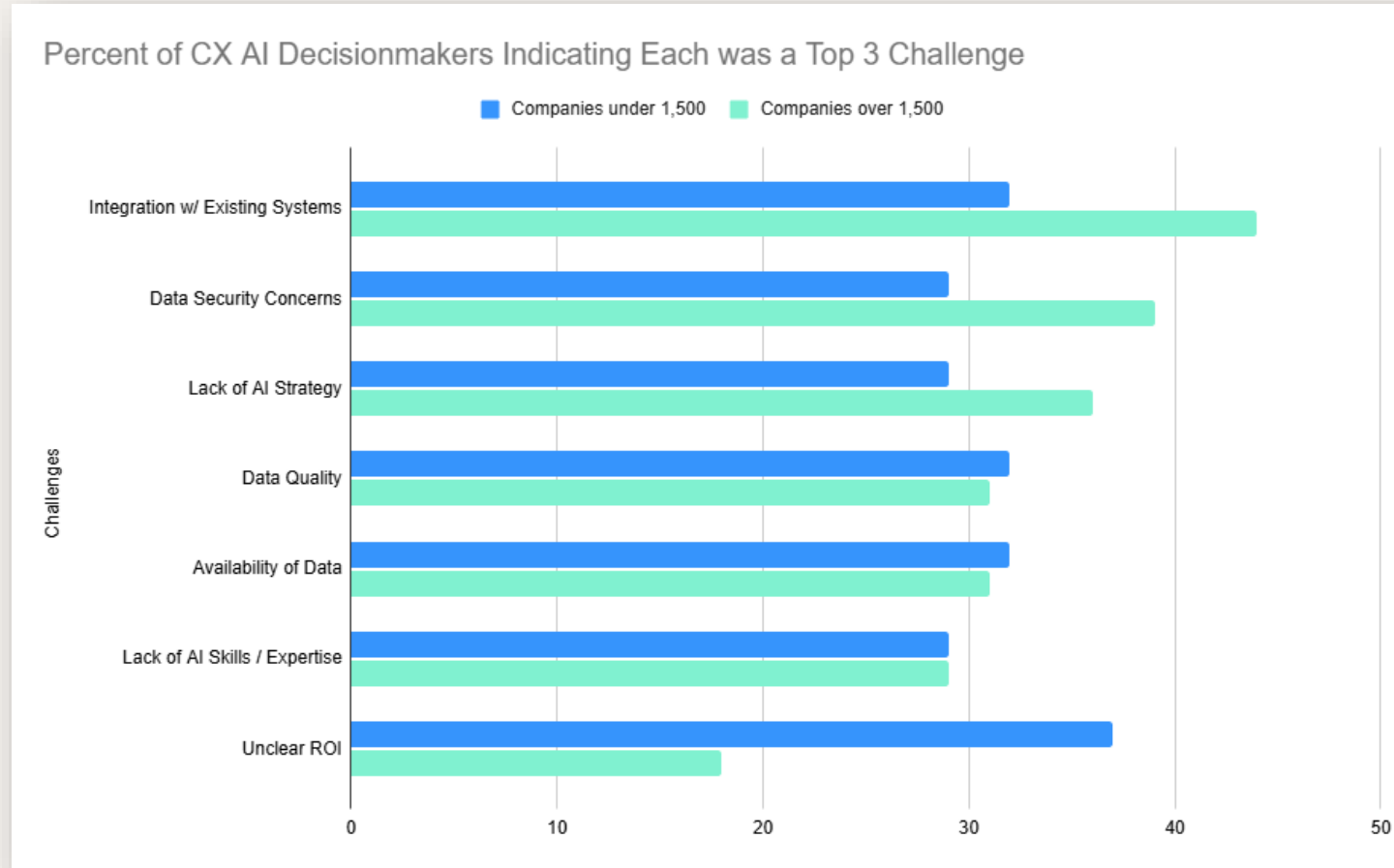


What's on YOUR mind?

What is the biggest challenge you're facing with organizational adoption of AI agents this year?

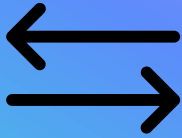
- Navigating budget constraints and cost-effectiveness
- Ensuring data privacy and security
- Integration with existing systems and workflows
- Understanding and managing AI capabilities

AI adoption challenges to overcome





How to overcome AI implementation barriers



**Integration with
existing systems**



**Data security
concerns**



**Lack of AI strategy
or ownership**



**Data quality or
availability**



**Lack of AI skills
or expertise**



Unclear ROI



So what does a **Solution Architect** do?

- Technical solution design
- Systems integration documentation
- Technical feasibility & conditions
- Technical & performance standards
- Technical risk management

Bring in at project initiation if there are significant transactional automations and/or multiple internal systems involved to manage technical risk.



Overcoming implementation barriers: an example

Example client

- Automation & AI part of enterprise strategy
- Additional staff & expertise needed for strategic expansion of AI-enabled IVA
- Gaps identified pertaining to goals:
 - Launch
 - Maintain
 - Optimize
 - Expand
- NLU Architect & Engineer + existing design & analytics resources
- 2 million contacts deflected (annually)



Questions to ask your **CX AI** partner

- What kind of data does your AI need to function optimally, and how will it integrate with our existing systems?
- How do you ensure that your AI solution can scale with our business as we grow, and what's the cost structure for future scalability?
- What steps do you take to ensure your AI complies with data privacy regulations, especially in highly regulated industries?
- **Will your solution cover every way that a customer might reach out to my organization?**
- **Are your tools using general-purpose AI or CX-specific AI?**

Q&A

?

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Thank You