

# **Beyond POC:** How to adopt AI agents for success

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world 



- **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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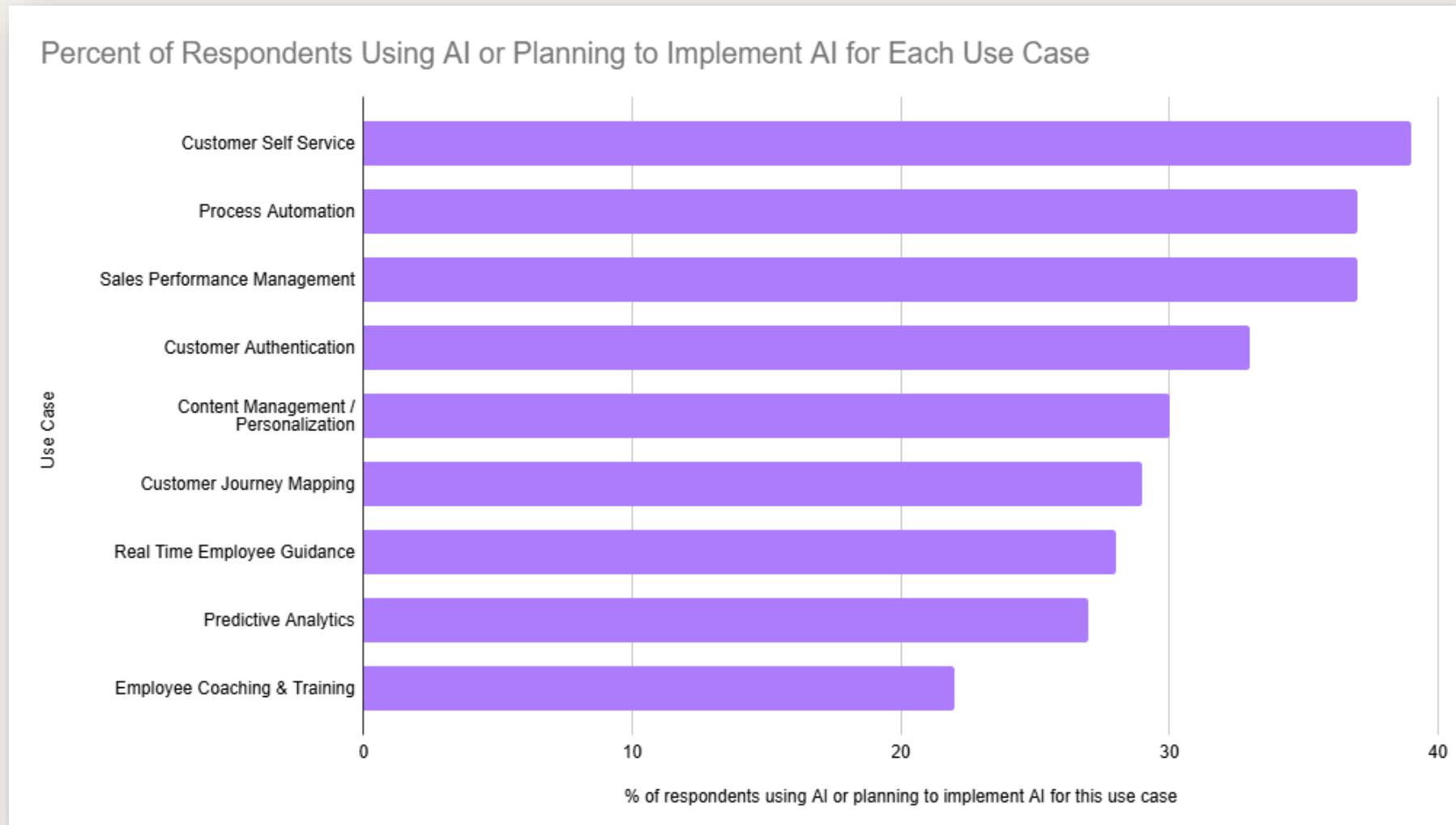


# What's on **YOUR** mind?

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

**225**

Customers went  
live with AI  
solutions in 2024

**44+**

Autopilot (IVA)  
customers live as  
of Fall 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?

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



# 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

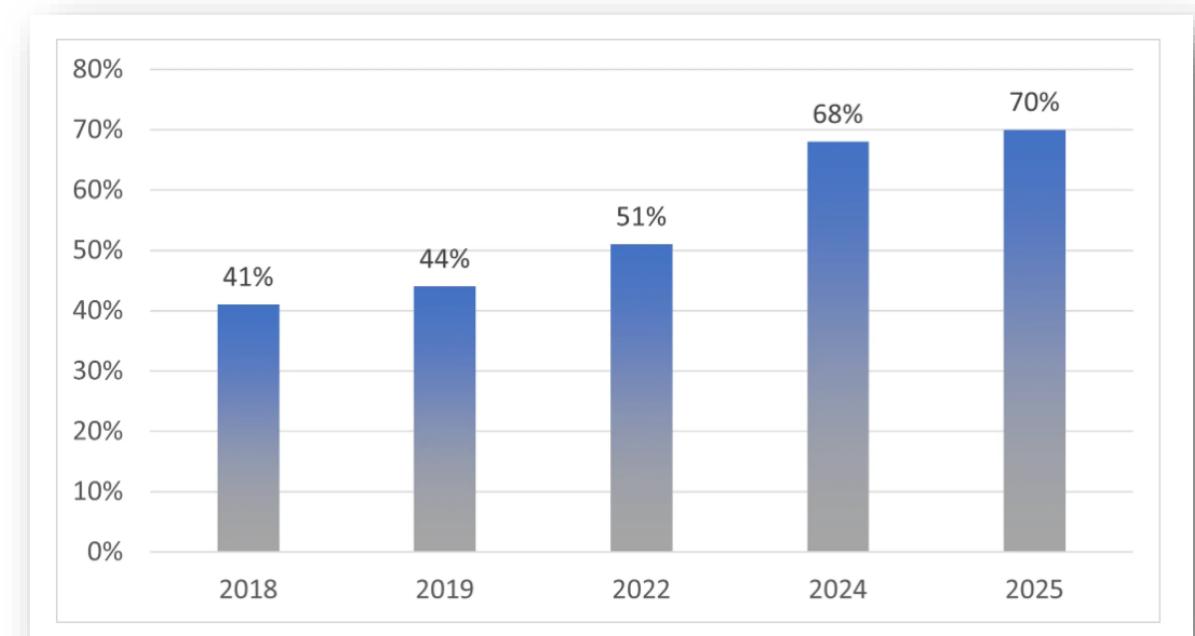
## Use a **proactive** AI agent if you want to...

- 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



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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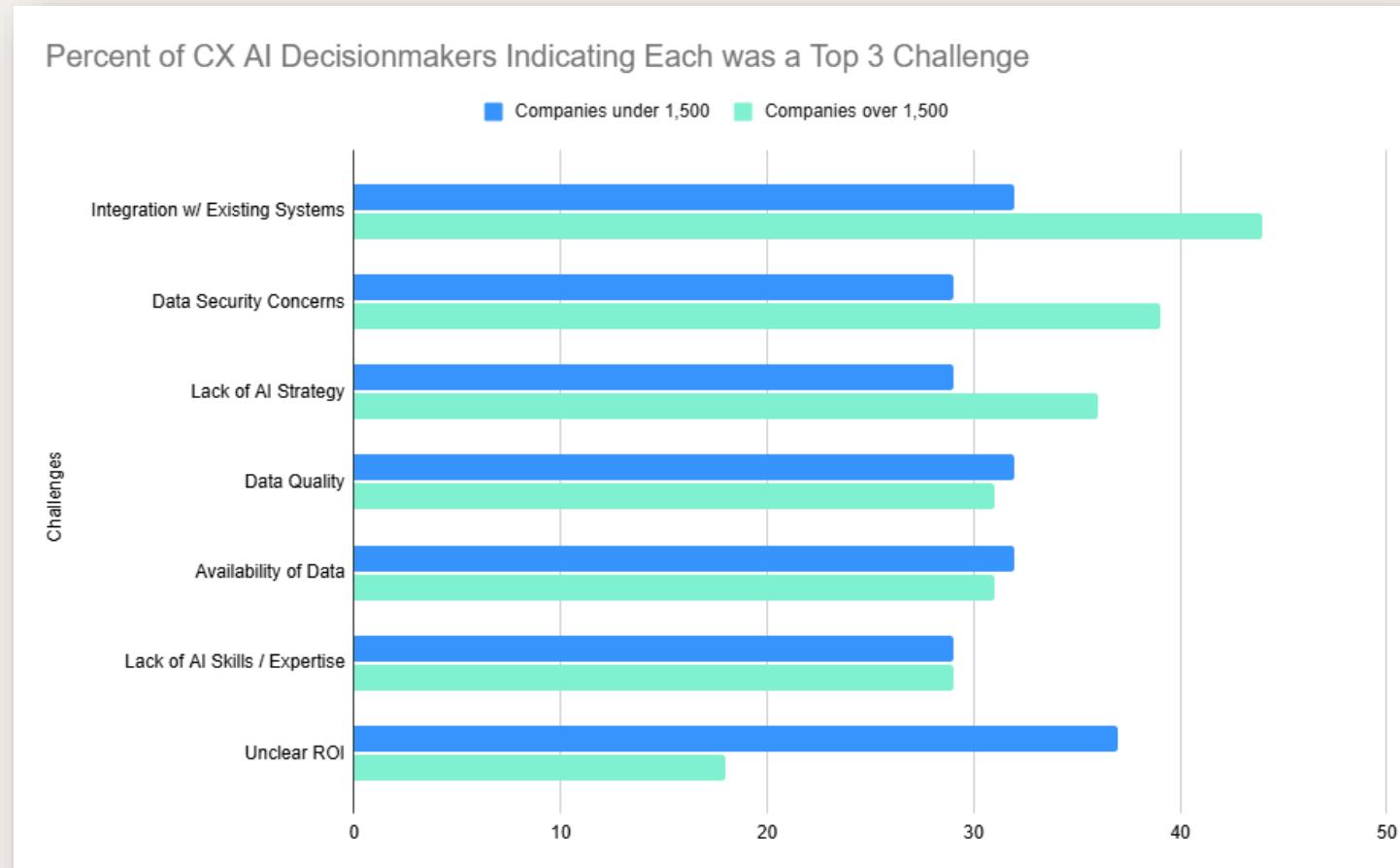


# What's on **YOUR** mind?

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

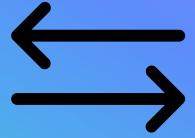
- Navigating budget constraints and cost-effectiveness
- Ensuring data privacy and security
- Integration with existing systems and workflows
- Understanding and managing AI capabilities

# 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

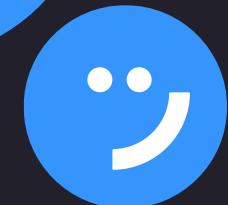
- What kind of data does your AI need to function optimally, and how will it integrate with our existing systems?
- How do you ensure that your AI solution can scale with our business as we grow, and what's the cost structure for future scalability?
- What steps do you take to ensure your AI complies 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