

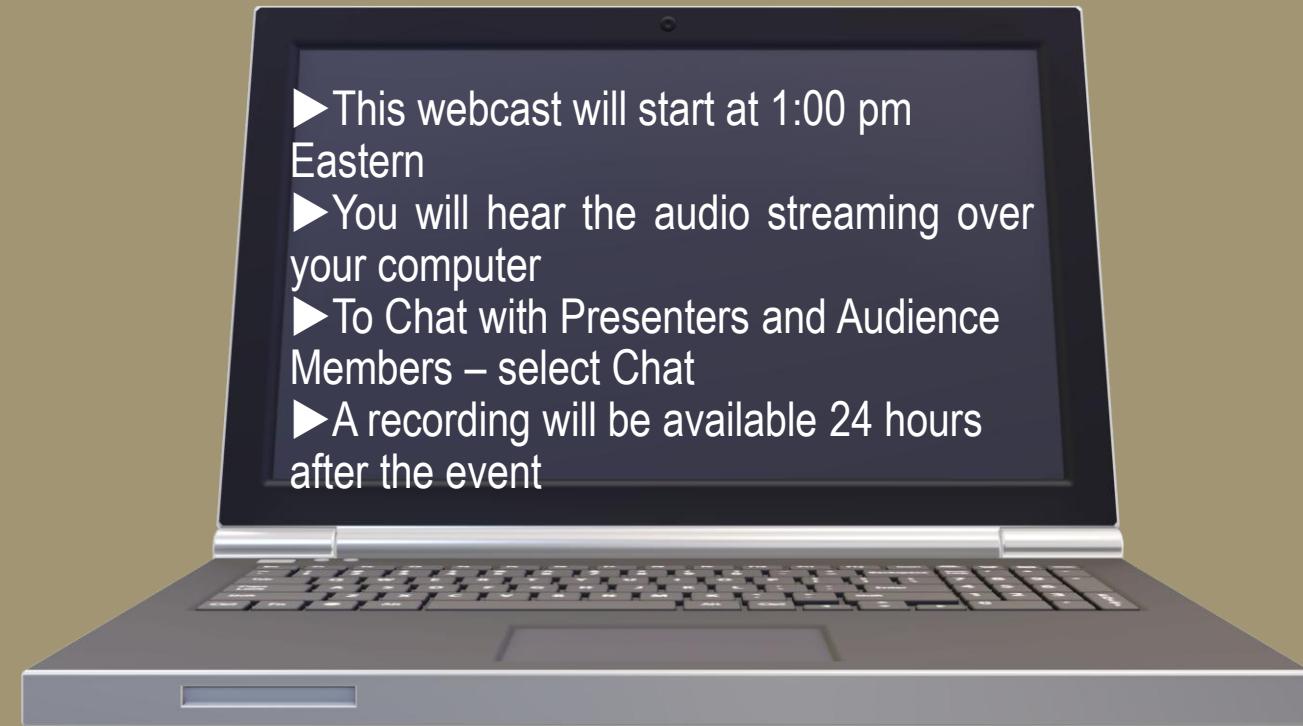
BEST PRACTICES – REDUCE AGENT AND CUSTOMER EFFORT



**Michele Carlson,
Director of
Product
Marketing, NiCE**



**Dave Singer,
Global VP, GTM
Strategy, Verint**



- ▶ This webcast will start at 1:00 pm Eastern
- ▶ You will hear the audio streaming over your computer
- ▶ To Chat with Presenters and Audience Members – select Chat
- ▶ A recording will be available 24 hours after the event

Best Practices to Reduce Agent and Customer Effort

December 2025



VERINT®



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Verint helps brands reduce agent and customer effort for stronger, faster value.

Automate manual CX workflows to reduce cost and elevate CX. Now.

Example 1: Conversational AI

What does it do?

- Automates self-service workflows to answer questions and complete tasks across channels

How does it reduce effort?

- Customers get fast, easy answers on their channel of choice with no agent involvement

Customers Demand Conversational AI

Digital Self-service

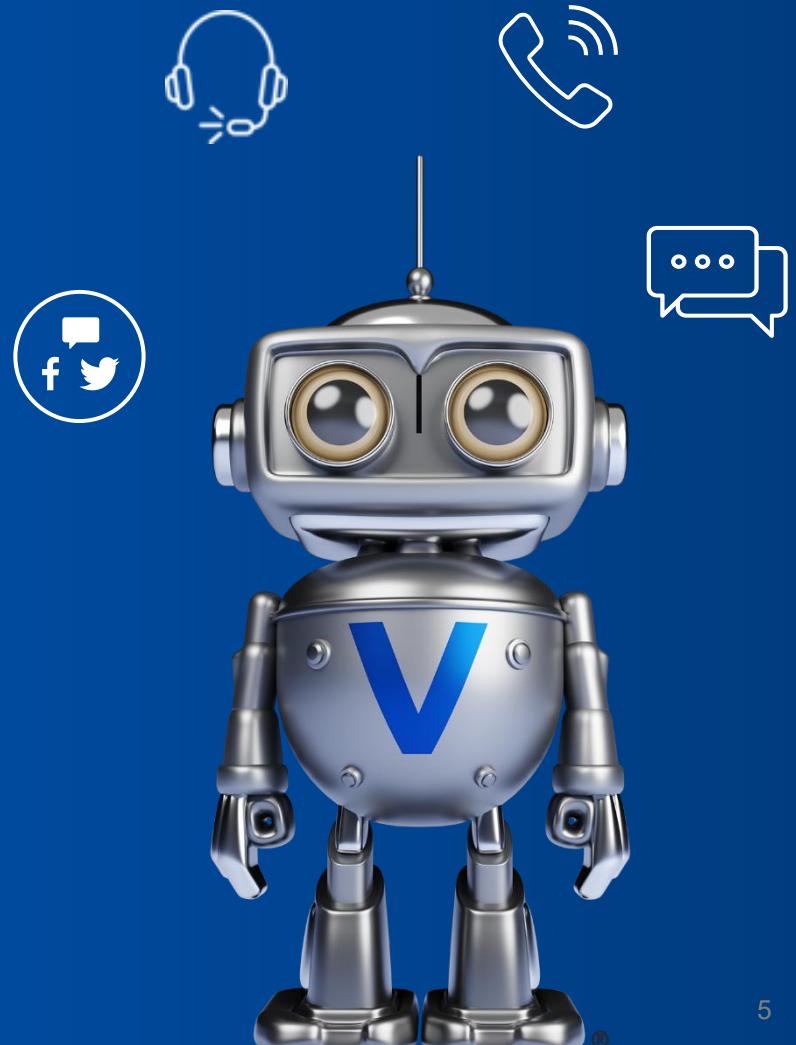
Automate interactions on digital channels (chat, messaging, social)

Voice Self-service

Automate voice interactions on existing IVR or telephony channels

Embedded Agentic AI Agents

Automate tasks for smarter self and assisted service

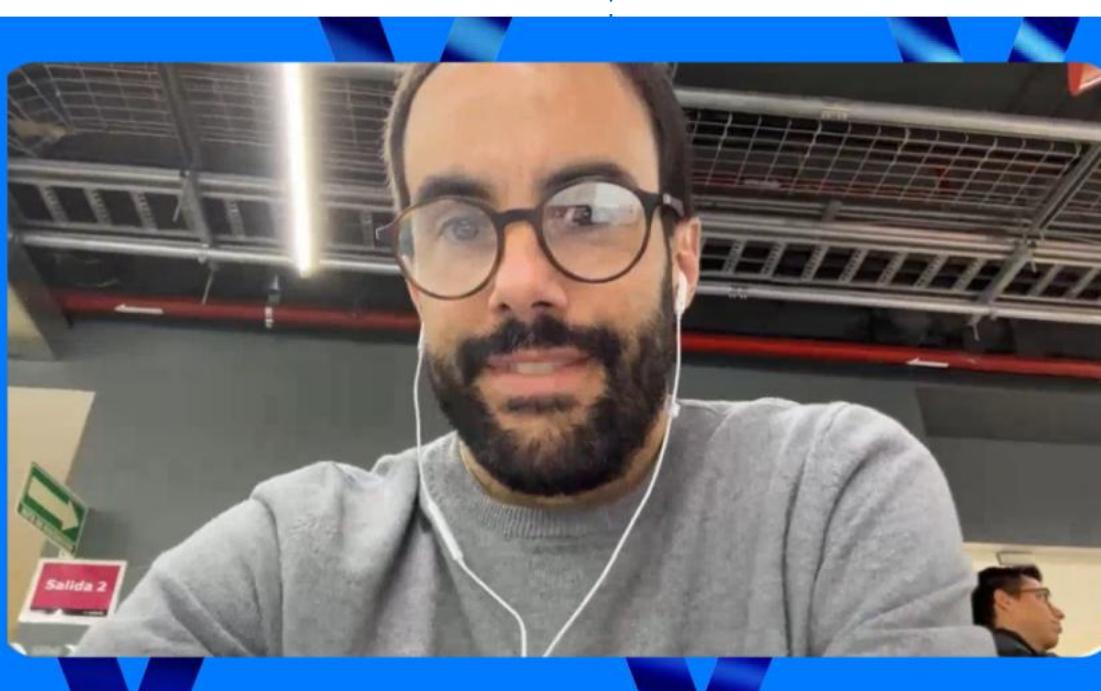


Volaris: Saving Millions and Elevating CX

volaris



Mexican Airline



AI-powered Self-service Business Outcomes:

- Over 85% containment rate
- 3x increase in agent capacity
- 20% increase in CSAT
- Volaris customers report faster response

Example 2: Agent Copilots

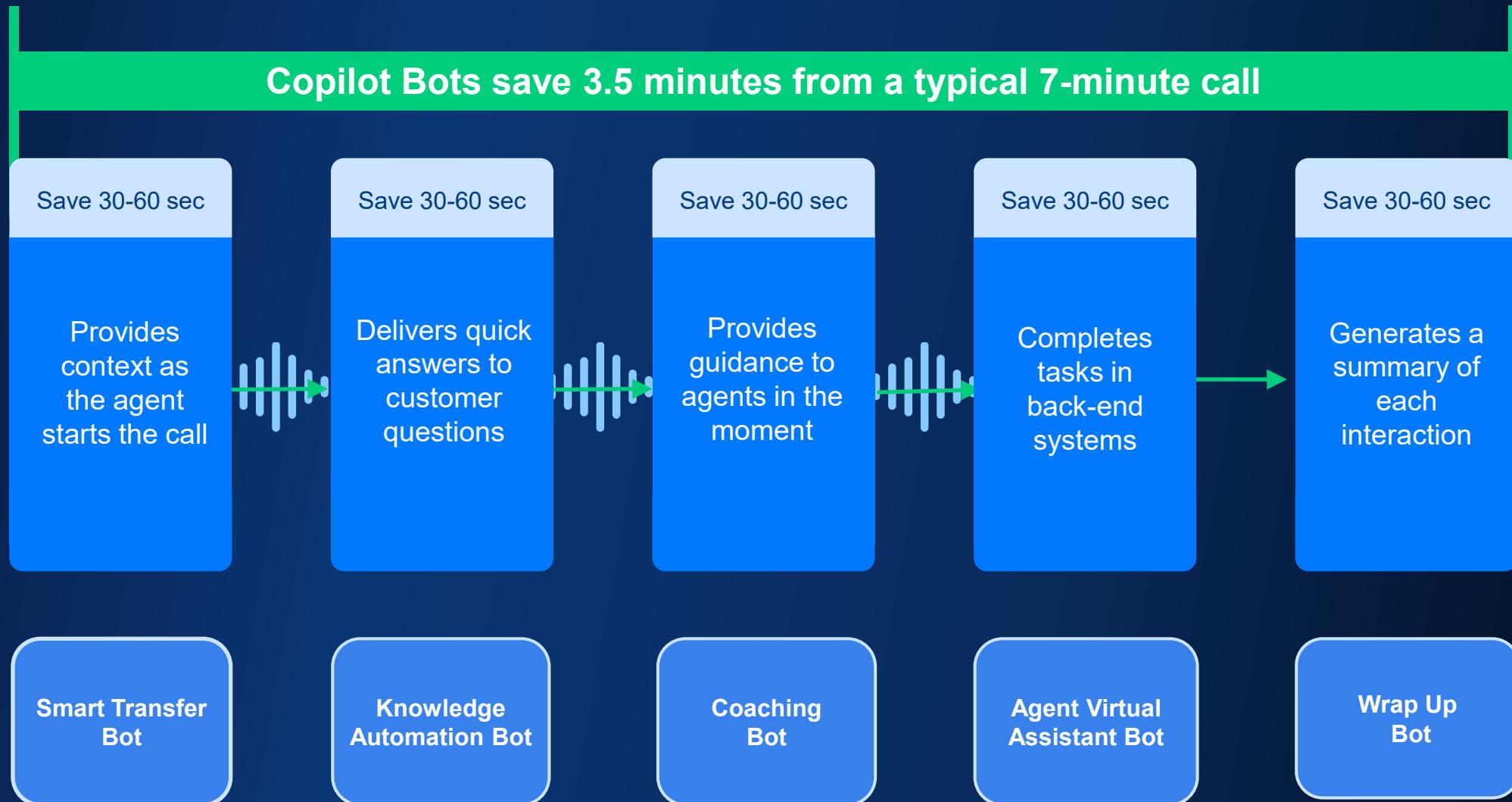
What does it do?

- Automates parts of an assisted interaction to help agents find answers, complete tasks, and deliver a superior CX.

How does it reduce effort?

- Agents can offload manual tasks and get quick help so they can focus on the customer.

Agent Copilot Bots Double Agent Capacity



Trainline Doubles Agent Capacity with Verint

Average Handle Time Reduced from 5 Minutes to 2.5

trainline



Robert McGough
Trainline

European rail services company
relies on Agent Virtual Assistant
to double agent capacity while
elevating customer experience

Example 3: Knowledge Management

What does it do?

- Provides a single source of truth for agents and IVAs to find accurate answers to questions.

How does it reduce effort?

- Both customers and agents can quickly and easily access answers they can trust.

Better Knowledge Reduces Effort

Reduced Agent Effort

- Agents can find fast answers to customer questions on varying topics
- Agents have a single source of truth for all customer interactions across channels

Reduced Customer Effort

- Customers can quickly self-serve with instant, reliable answers to questions
- Knowledgeable agents deliver great customer experience with less effort

AI Business Outcomes Example

Financial Institution Increased Agent Capacity & Improved CX with Verint KM

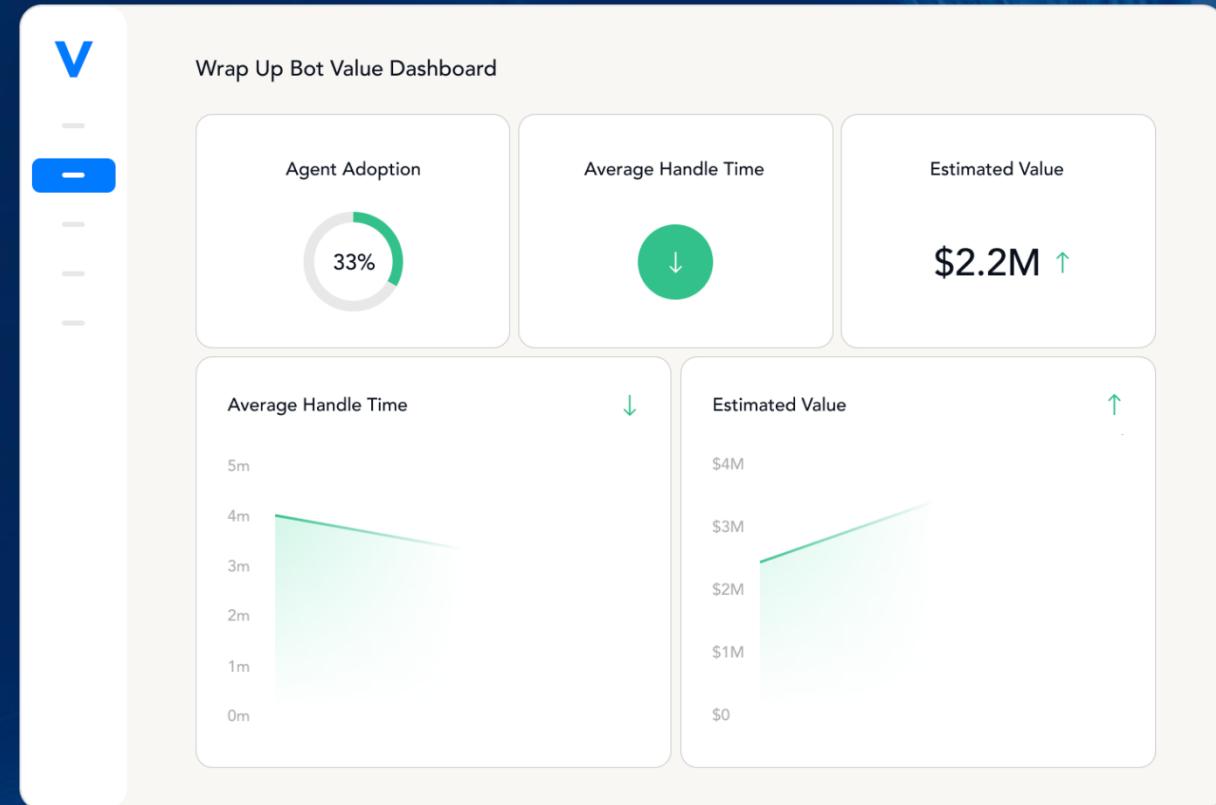


- A financial institution employs 4,500 agents
- Knowledge Management helps agents find the right information faster, reducing call duration by about 20 seconds (7% of a 5 min call)
- With each agent having annual cost of \$40,000, 7% increase in agent capacity drives **\$13M value**
- Agent access the right knowledge also resulted in improvements to CX, FCR, and hold times

Bonus: Value Dashboards

Measure Your AI Value

- Reducing effort is an important goal, but how does it tie to tangible ROI?
- Many AI projects fail to deliver value
- Value dashboards ensure your solution is achieving the results you want, and allows you to quickly adjust as needed



Let's Get Started!

Build-a-Bot Workshop

Hands-on workshop
brings your AI Agent
to life in just one day.

Deploy Your AI Agent

Move to live
deployment and see
value in 30 days.

Scale at Your Pace

Value Dashboards
determine use cases
to automate next.

Every day you wait is costing you thousands of dollars

Thank You



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CRMxChange Roundtable: Best Practices to Reduce Agent and Customer Effort

December 10, 2025

Top 3 Best Practices to Power Effortless CX for Happier Customers & Energized Agents

Michele Carlson
Director of Product Marketing
NiCE



NiCE



- The new CX landscape
- What agents and customers want
- Top 3 best practices for effortless CX
- Effortless CX in action with AI
- Q&A

Customer experience has fundamentally changed

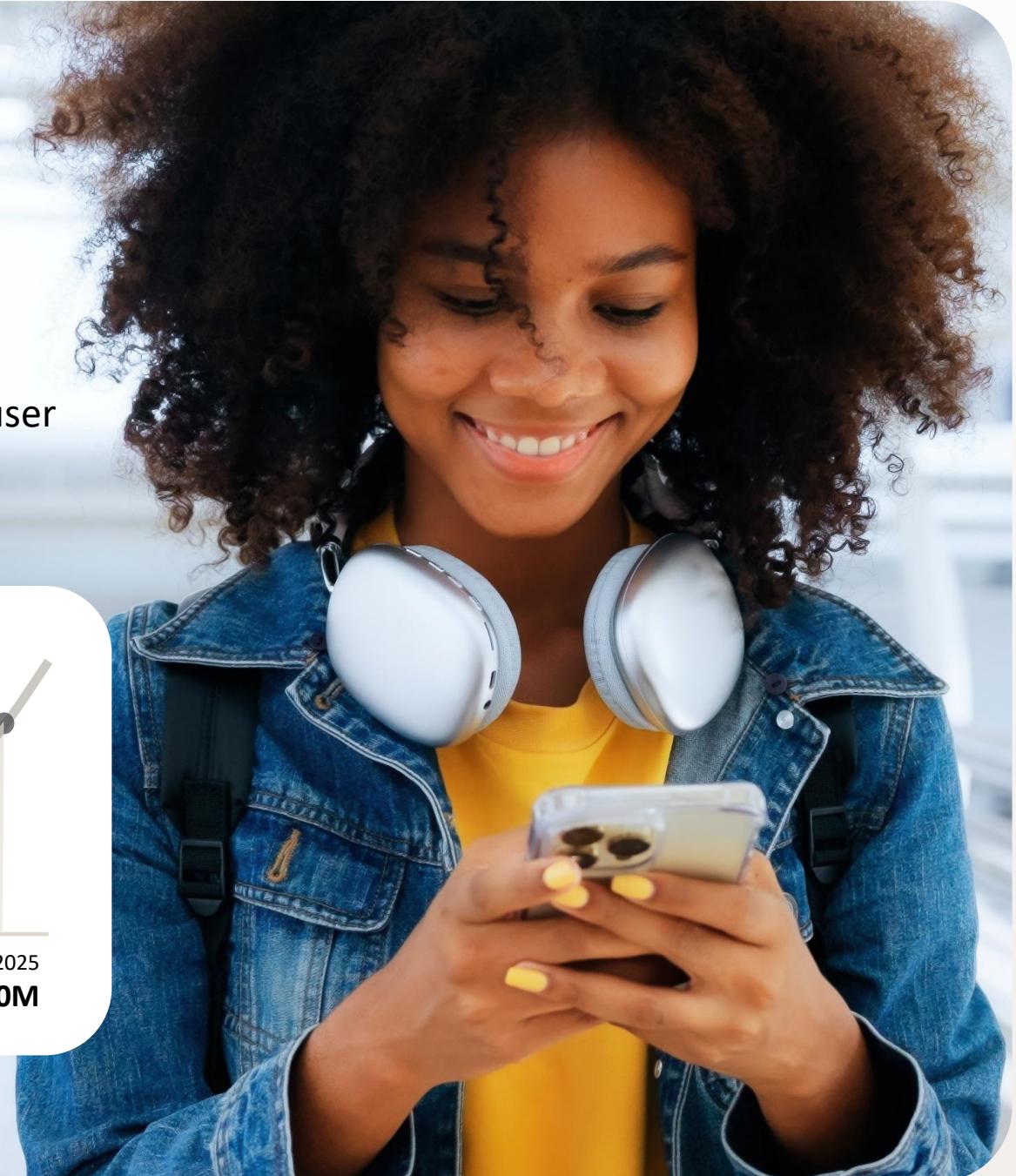
With hyper-personalized information, just one prompt away, user expectations have never been this high.

Consumer AI Adoption in
WAU (weekly active users)

2023
100M

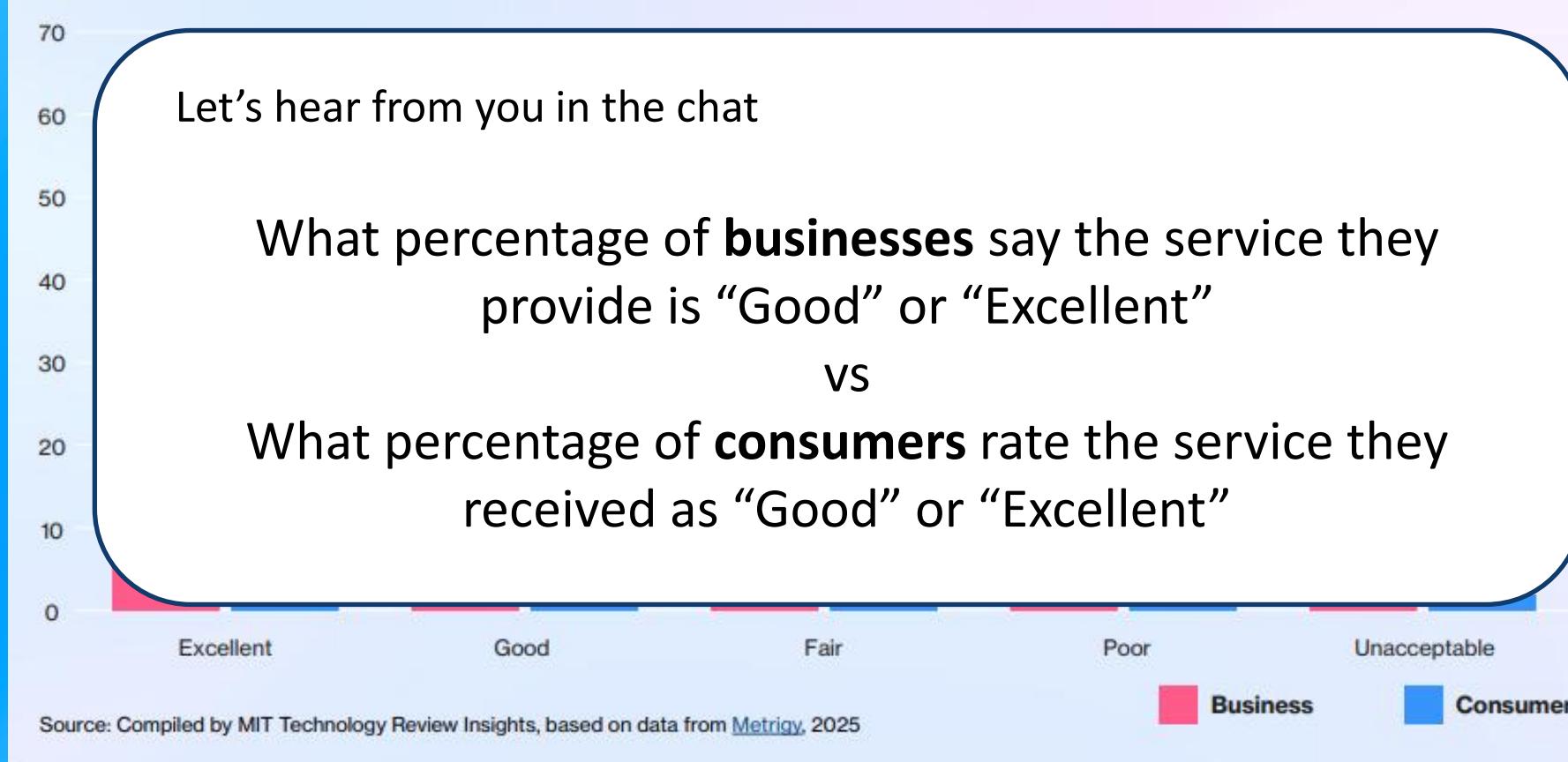
8x

2025
800M



Perceptions of customer service

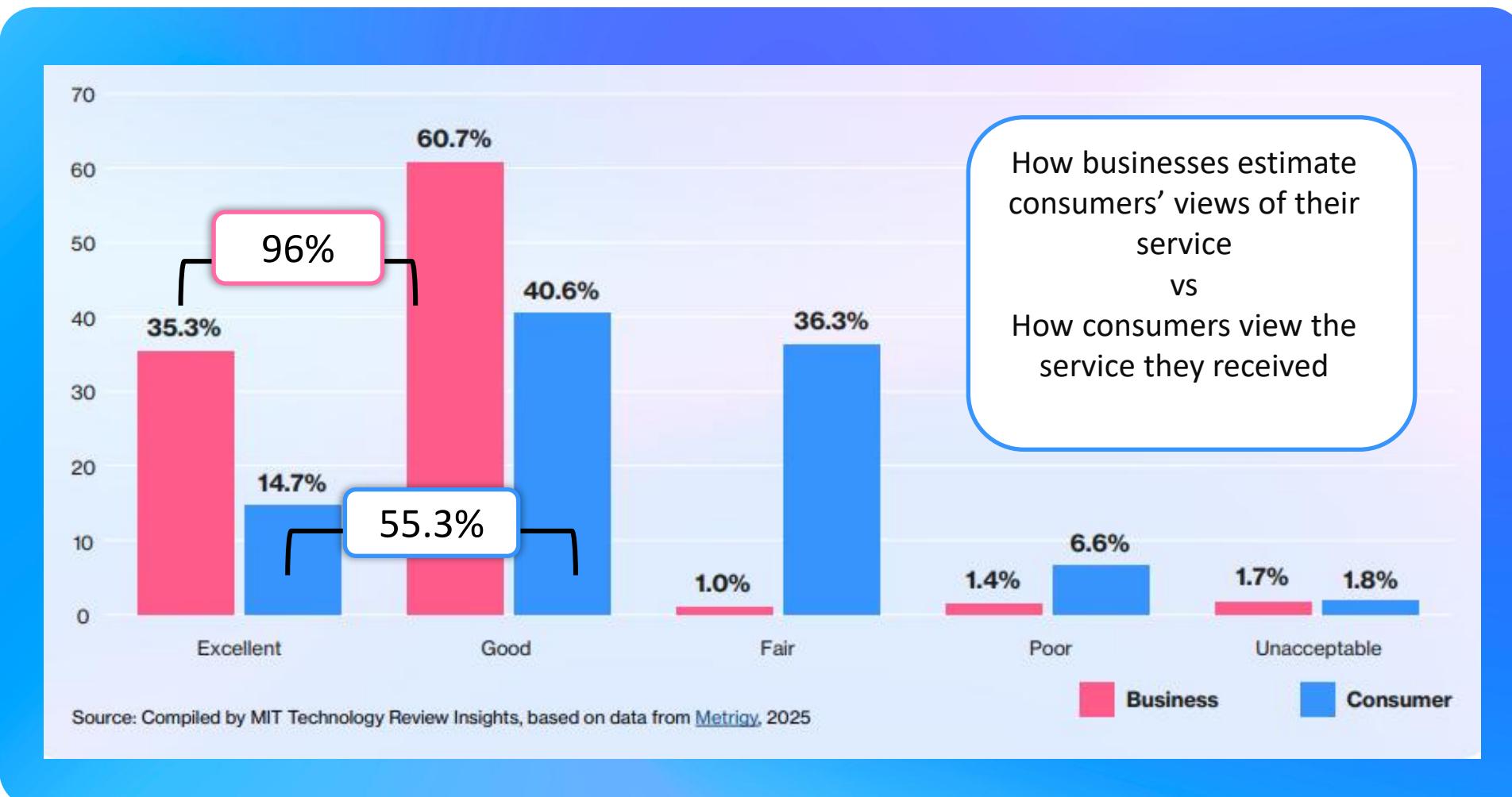
Businesses vs Consumers



Read more: MIT Technology Review Insights Report: The Connected Customer

The customer service perception gap

Businesses vs Consumers



Read more: MIT Technology Review Insights Report: The Connected Customer

NiCE

NiCE analyzed billions of customer interactions...

Brands **excelling in customer sentiment** outperform their peers by an impressive **43 percentage points** in stock returns over five years.

This competitive advantage is accelerating, with a remarkable **15 percentage point gap emerging** in just the last year.



That's so NiCE



Happy customers drive exceptional business growth and stock performance



Read more: NiCE State of CX Research Report

NiCE

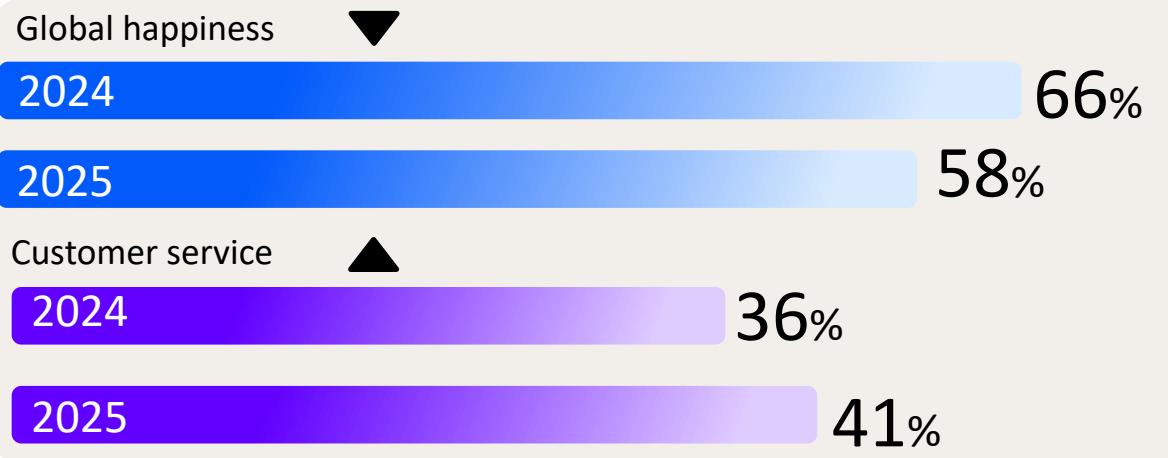
What customers want

Speed, personalization, easy resolution

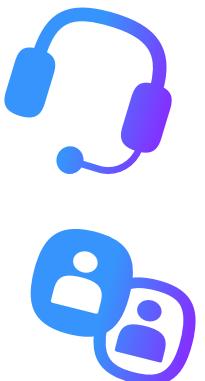
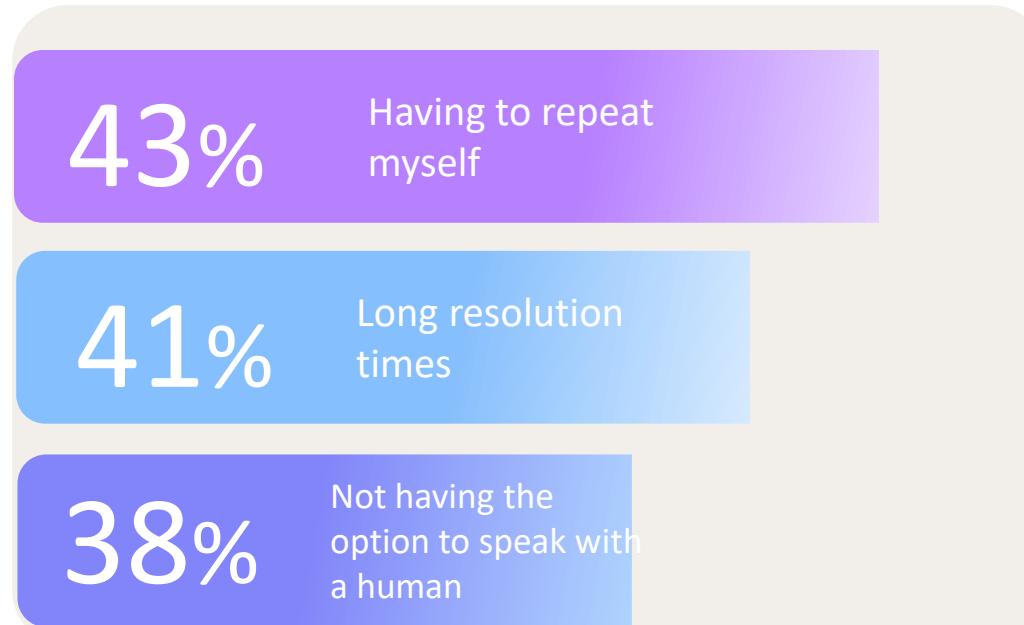
Less friction

Effortless service

Global happiness is down, even though customer service is up



The top answers globally when asked about the biggest cause of unhappiness in general customer service:



[Read more: NiCE Global Happiness Index 2025](#)

NiCE

What agents want

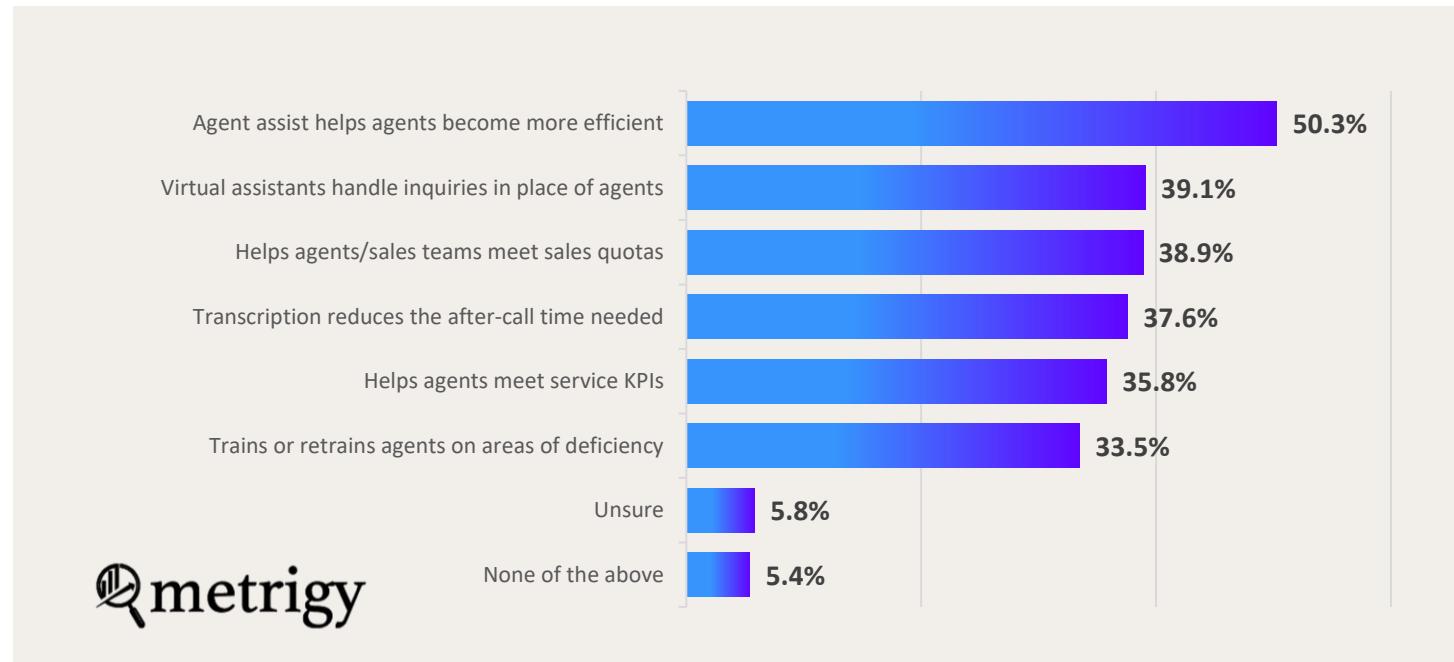
Minimize tool-hopping,
unify the workspace

Eliminate repetitive, manual
tasks

Reduce mental strain

"77% of agents are handling complex issues all or most of the time, which causes burnout. Companies are using AI to determine when an agent needs support. AI can determine when the agent needs a break, which links to lower turnover rates."

Robin Gareiss,
CEO and Principal Analyst,
Metrigy



Read more:

MIT Technology Review Report: The Connected Customer



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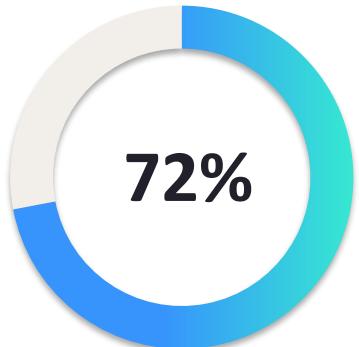
Let's hear from you in the chat

What is the biggest challenge your agents face today?

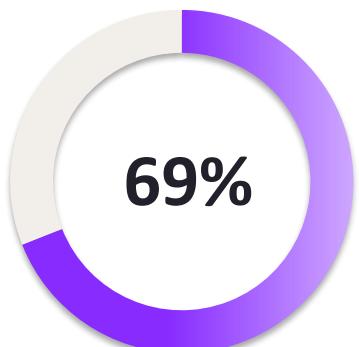


Best Practice #1

Lean into AI-first CX as the dominant model for customer engagement



72% of consumers
say they have experienced benefits from AI and automation in customer service



69% of consumers trust
companies that use AI as much or more than those that don't

Read more:
NiCE Global Happiness Index 2025

“Gartner® predicts that by 2029 **Agentic AI will autonomously resolve 80% of common customer service issues** without human intervention leading to a **30% reduction in operational costs.**”

Gartner

Best Practice #1

Lean into AI-first CX as the dominant model for customer engagement

“AI resolved 41.1% of interactions without requiring live agent support, underscoring the effectiveness of AI in managing a significant portion of customer inquiries autonomously.”

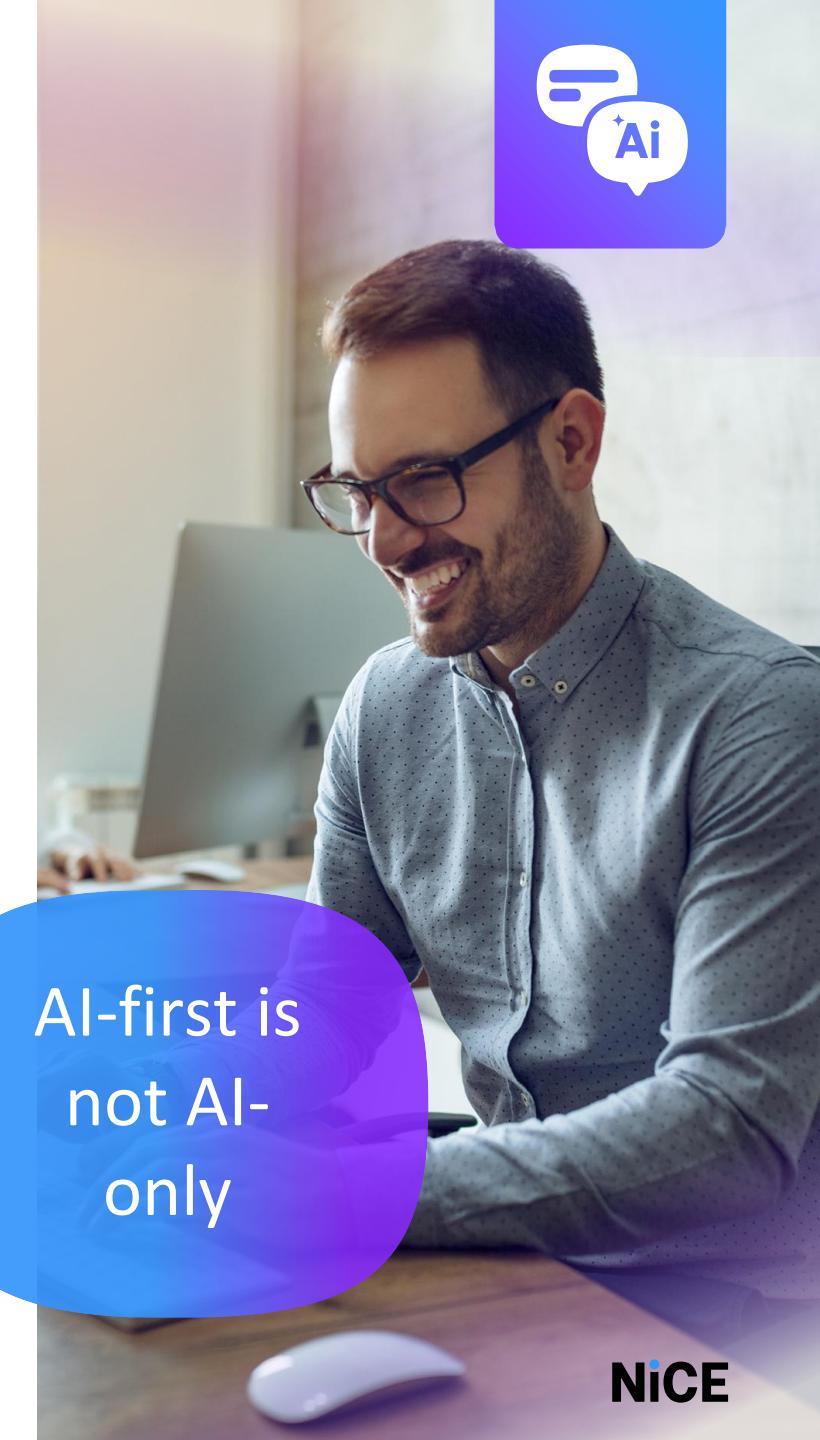


Metric Research Corp
AI for Business Success 2025-26

Take action

- Get personal and proactive: customers' expectations are higher than ever
- Empower agentic AI to resolve tasks
- Blend AI and human expertise seamlessly

Read more:
NiCE CX Trends 2026 – “Top 10 Strategic Insights”



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Best Practice #2

Orchestrate workflows across the enterprise with connected intelligence

“Ultimately, the real value comes from how everything is orchestrated.”

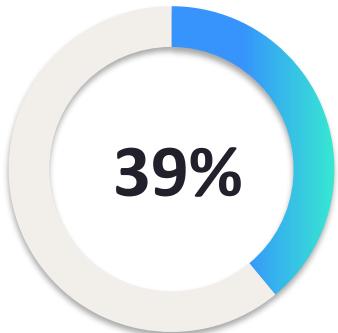
The magic happens when AI agents and human agents work as one, **powered by shared context, data, and insights.”**

opusresearch

Opus Research
The Future is Now for AI
in CX

Read more:

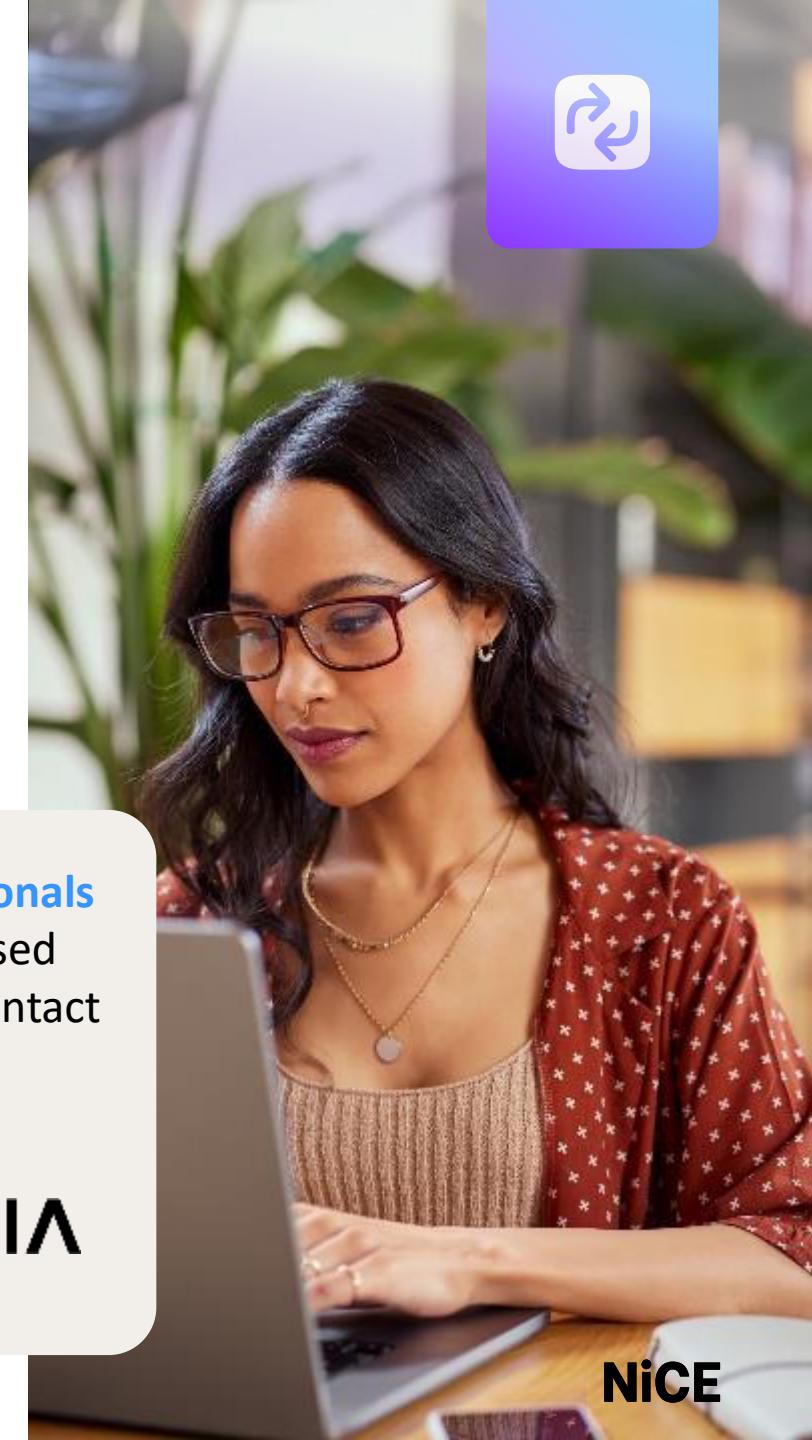
NiCE CX Trends 2026 – “Top 10 Strategic Insights”



39% of North American CX professionals report AI-led automation has increased proactive issue resolution in their contact center.

OMDIA

Omdia
The State of Digital CX 2024:
Survey Analysis



NiCE

Let's hear from you in the chat

Is your organization using automation to
proactively resolve customer issues? If yes, how?
If not, what's the barrier?

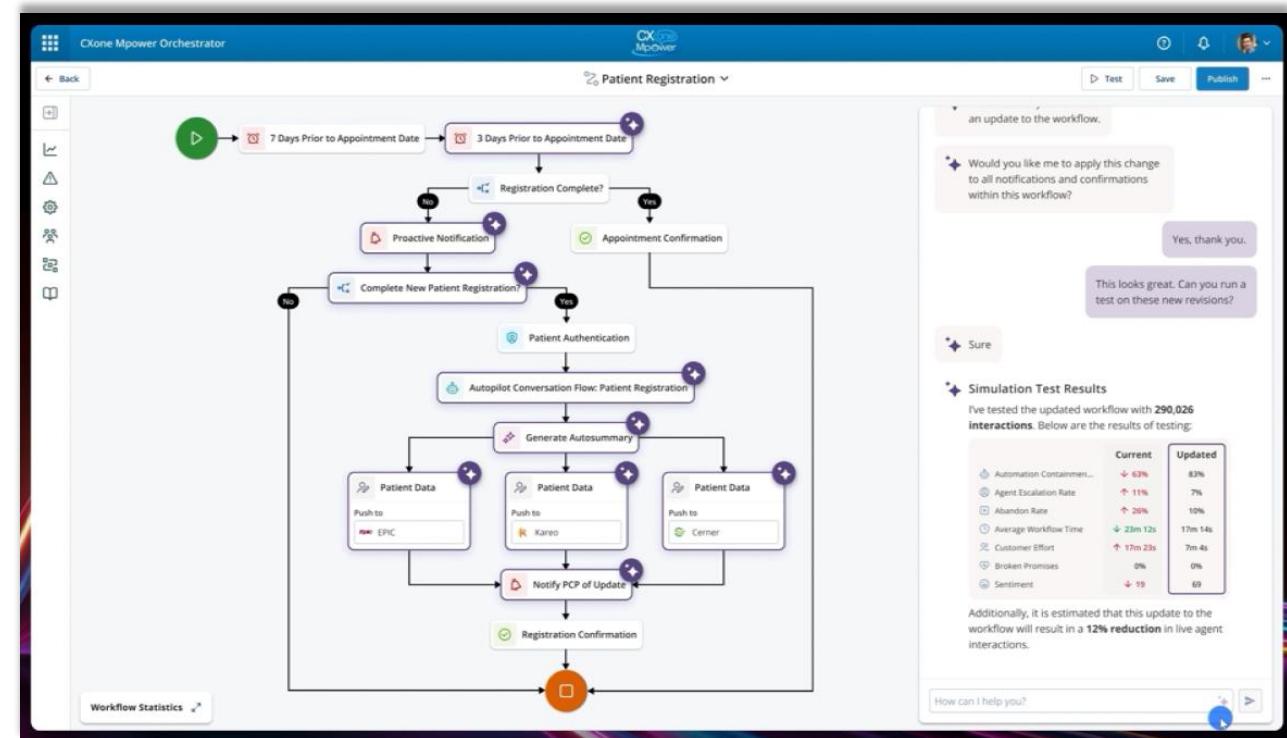


Best Practice #2

Orchestrate workflows across the enterprise with connected intelligence

Take action

- Trigger workflows instantly from any customer intent or channel
- Connect systems with flexible, open integration hubs
- Unify tech with event-driven automation
- Automate fulfillment end-to-end, beyond just answers



Read more:

NiCE CX Trends 2026 – “Top 10 Strategic Insights”

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Best Practice #3

Build smart, collaborative experiences with AI agents

"The market for agentic AI is slated to expand from **USD 7.06 billion** in 2025 to **USD 93.20 billion** by 2032."

Report by MarketsandMarkets on Agentic AI in Customer Experience



Read more:

NiCE CX Trends 2026 – "Top 10 Strategic Insights"

"Agentic AI... goal-oriented behavior with adaptive decision making opens an **opportunity to improve the productivity of all team members**—from front to back office and knowledge workers."

Forbes Business Development Council
How Agentic AI Is Enabling The Next Frontier Of Innovation For Banks

"Agentic AI systems promise to **transform many aspects of human-machine collaboration**... from dynamically reconfiguring supply chains to engaging in realistic interactions with customers."

Harvard Business Review
What is Agentic AI, and How Will It Change Work?

Best Practice #3

Build smart, collaborative experiences with AI agents

Take action

- Solve customer needs start-to-finish—no handoffs required
- Resolve faster by acting on real-time enterprise data
- Keep every channel, team, and workflow connected
- Kick off actions across CRM, billing, fulfillment, and support

Intelligent AI agents orchestrate work *across departments*, ensuring every experience feels connected.



AI Agents in action at



Lufthansa

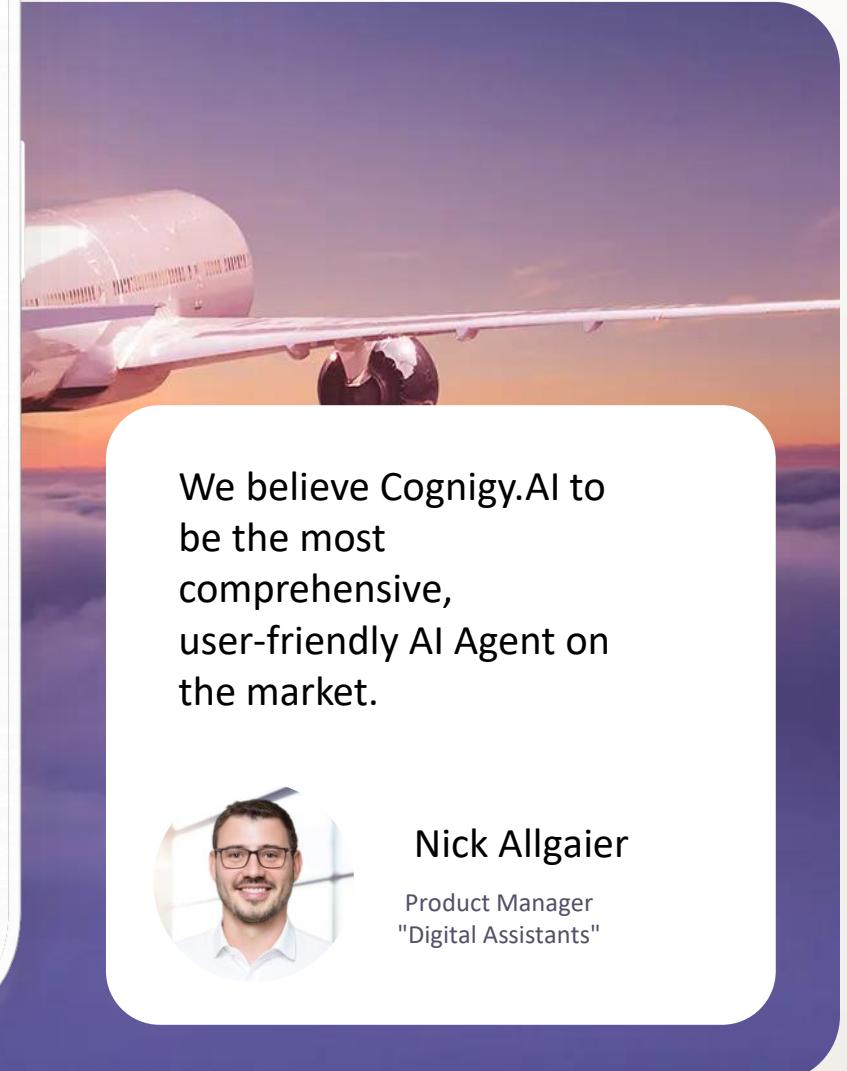
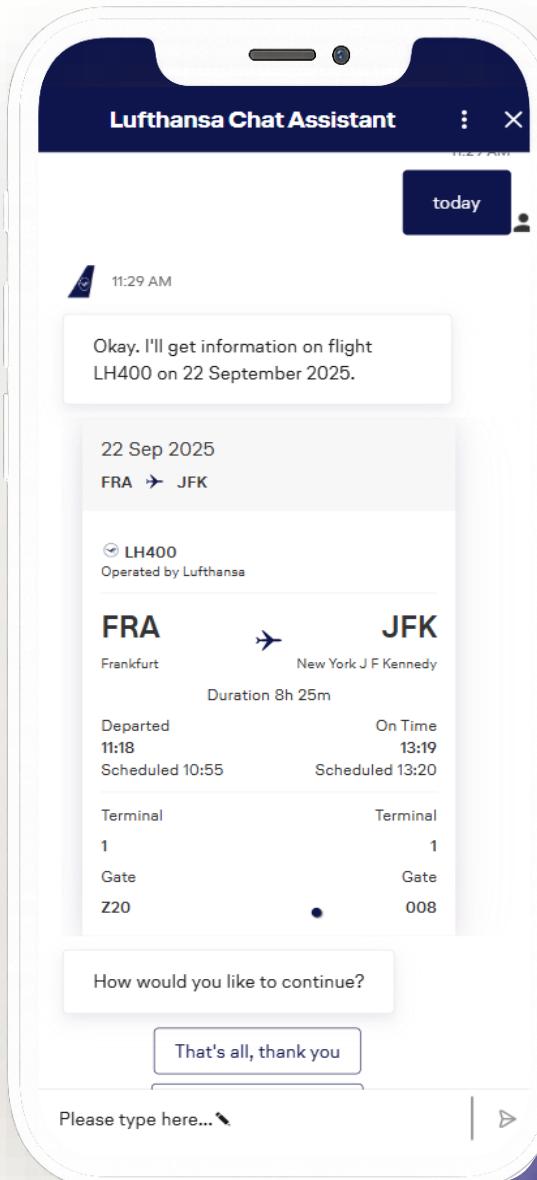
16M automated conversations per year for rebooking, refunds and more

16M
Conversations Automated in 2025

80%
Automation Rate for Refunds & Rebookings

12K
Messages/min peak loading

16+
AI Agents live with real-time AI translation

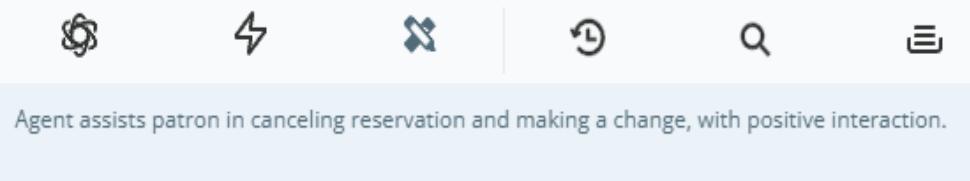


Human-AI collaboration in action

Realtime Summary

Removes notetaking from the agent's workload by capturing everything as it happens.

App Space



Sentiment Analysis

Reads the emotional pulse of the interaction from start to finish so agents can respond to every moment with confidence.



Customer Sentiment is Negative

Patron expressed frustration with the agent's initial response.

Agent Query Responses

Gives agents enterprise knowledge at their fingertips without searching.

What are the exchange rules for American Airlines bulk fare to Mexico?
Ticket is exchangeable.
Exchanges must be issued within one year of the original issue date.
New travel must begin within one year of original issue date.
The original fare type must be maintained.
For mixed carrier itineraries, the most restrictive change fee is applied.
\$0 per person change fee if travel starts in North or South America.

Web Links (2)

Final Summary

A comprehensive summary, tailored to your QA and compliance needs with outcome-ready intelligence that accelerates post-interaction workflows.

DISPOSITION NOTES

✓ AutoSummary Completed

CD requested CX of Jamaica reservation #87654321 for 2026 travel due to hurricane concerns. ADV full refund available; CD approved CX and inquired about insurance options. Final amount quoted \$1,500.37. S/W CD regarding TPP addition.

Restructuring knowledge articles with AI

Original Article



Scheduled Air Brand Fee - Cancel

Last updated: Nov 12, 2024, 6:33 AM by tempstacy Page restriction: Private



4+ days from departure

I Scheduled Air Cancel

\$100 per person for non-refundable flights

- Reimbursement without TPP = Travel Credit
- Applies for canceling the entire trip or dropping a passenger
- ALGV Brand Cancel fee will be waived upon rebooking, if the rebooking occurs within 7 days of cancellation.
- If no airline or supplier fees apply, the fee is waived if a new reservation is made within 7 days of the original reservation cancellation. New reservation must meet the rules for the ticket to be exchanged.
- For reservations without TPP, eligible airline waivers can be used as long as the air ticket was paid in full, the airline allows it, and if exchange is required, there may be an additional fee to exchange the ticket.
- Brand Fees do not apply for infants (lap child).
- Fees are applicable for any package containing Scheduled Air, including Fly/Drive packages.

3-0 days from departure

I Scheduled Air Cancel

\$100 non-refundable

- Reimbursement without TPP = N/A for cancellation
- Applies for canceling the entire trip or dropping a passenger
- Non-Refundable Classification: When a package is canceled back to rebook at a later time, regardless of air (bulk or published) it can be exchanged for a new package.

Restructured Article

Last updated: Dec 8, 2024, 11:30 PM by jamestemp Page restriction: Private



In this article

- Cancellation Policies by Days from Departure
- 4 or More Days from Departure
- 3 to 0 Days from Departure
- General Policies
- Key Definitions
- Non-Refundable Clarification
- Quick Reference Guide

Cancellation Policies by Days from Departure

Cancellation fees and policies vary depending on the number of days prior to departure. Refer to the tables below for details.

4 or More Days from Departure

Policy Element	Description
Fee	\$100 per person plus applicable airline, hotel, and feature penalties
Reimbursement without TPP	Travel Credit
Applies To	Canceling the entire trip or dropping a passenger
ALGV Brand Cancel Fee	Fee waived upon rebooking within 7 days of cancellation
TPP Transfer	If no airline or supplier fees apply, the Trip Protection Plan (TPP) is unused and can be moved to a new reservation within 7 days
Airline Waivers	Eligible airline waivers can be applied if tickets are paid in full and airline rules are met; airline reissue fees may apply
Other	Other cancellation fees do not apply
Notes	Notes apply to all packages containing scheduled air, including Fly/Drive packages

A survey of agents showed that **75% agreed or strongly agreed** that the article restructure made finding information easier

Let's hear from you in the chat

If you could change one thing about your knowledge base to make life easier for agents, what would it be?

CX-specific Copilots mean less agent effort, more agent energy

“Love, love, love the final summary. For me, it was a game changer and has helped me cut down on my post-call time.”

“... it can return the correct information that I am looking for quicker than I can search for it.”

“It’s amazing and helpful”

“This is the **best** new tool I have ever seen in my 10 years here...hands down.”

“Copilot easily helps to understand the sentiment of the customer.”

“Great tool for new hires.”



NiCE Customer in the Travel & Hospitality Industry

NiCE

Efficient. Profitable. Loved.

NICE

Real results from real customers.



100+

Countries supported
in global expansion



98%

Love the AI Agents for
customer care and in-
car Voice Assistance



KAISER
PERMANENTE®

14%

Decrease in Average
Handle Time



11

Vendors migrated off
to create streamlined
stack



SONY

15%

Increase in self-service
success

Top 3 Best Practices to Power Effortless CX for Happier Customers and Energized Agents

Best Practice #1



Lean into **AI-first CX** as the dominant model for customer engagement

Best Practice #2



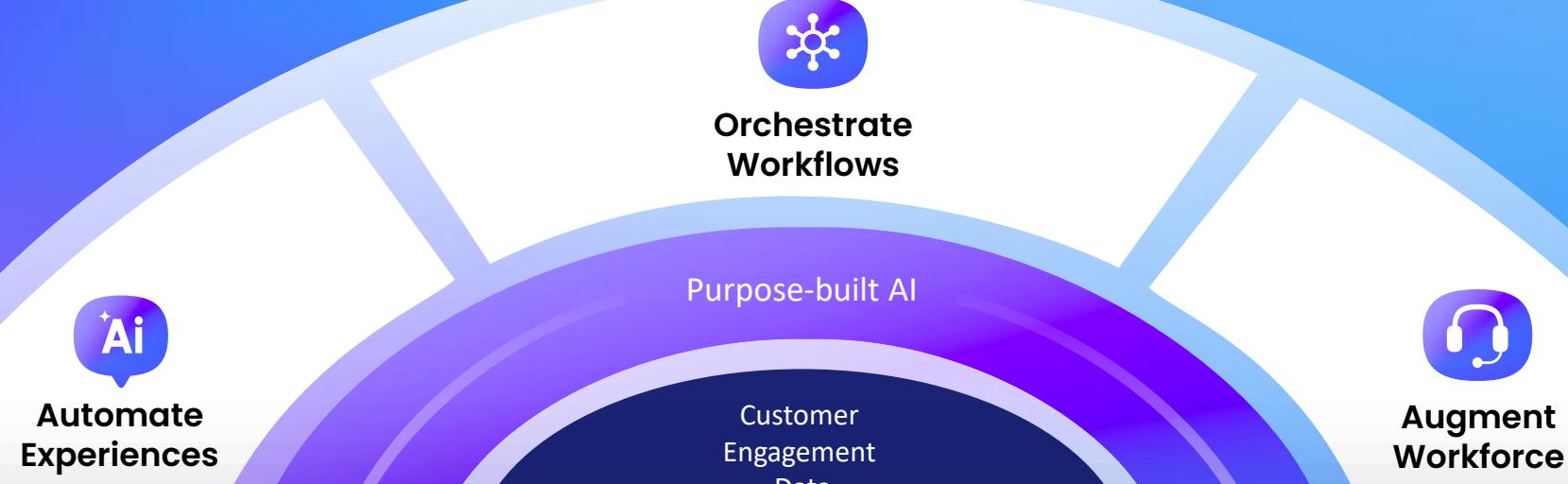
Orchestrate workflows across the enterprise with **connected intelligence**

Best Practice #3



Build smart, collaborative experiences with **AI agents**

The World's Leading
CX AI Platform
NiCE | CXone
Mpower



Flexible

Connected

Scalable

Secure

Create a
NiCE
world



Thank You

Michele Carlson
Director of Product Marketing
NiCE



Be on the lookout for an email with resources from today's discussion

MIT Technology Insights The
Connected Customer



NiCE CX Trends 2026
Top 10 Strategic Insights



NiCE State of CX
Real Insights from the Largest
CX Dataset



NiCE Global
Happiness Index



NiCE



Thank You

BEST PRACTICES – REDUCE AGENT AND CUSTOMER EFFORT



**Michele Carlson,
Director of
Product
Marketing, NiCE**



**Dave Singer,
Global VP, GTM
Strategy, Verint**

