



# How to Get Started With AI for Customer Service

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A step-by-step roadmap to prepare your contact center for AI

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# Introduction

AI is changing the way contact centers serve their customers.

With its ability to fully resolve calls, eliminate wait times, and increase hiring efficiency, it's no surprise that 80% of organizations anticipate an increase in AI investments next year, according to McKinsey.

Still, AI can be a daunting undertaking for any contact center leader.

Part of the reason is that AI is one solution in a long line of many. For years, contact centers have tried to tamp down costs with chatbots, IVRs and agent assist tools that overpromised and underdelivered.

Another reason is that AI itself can be intimidating. Can it actually address the decades-long challenges of contact centers? Will it require months or years of resources to launch? And, after launching, will you be positioned to keep pace with AI's rapid growth?

Even after checking these boxes, the trepidation many leaders have toward AI often boils down to one big question:

**“Are we ready?”**

From the readiness of your tech stack to that of your customers, agents, and even company culture, understanding how AI might fit into your organization's landscape can feel like an impossible question to answer.

This guide will give you the tools you need to effectively communicate the value of AI, assess your AI readiness, master the steps of a deployment project, and ultimately influence change in your organization.

# Determining Your AI Readiness

Every contact center leader will eventually invest in AI. Great ones already have. Following the rise of ChatGPT in 2023, AI became mainstream, prompting many contact centers to accelerate their investments. As such, a lot can be gleaned from what early adopters had in common before implementing AI, and their immediate results.

## Top readiness factors:

- **Immediate challenges:**

Nothing lends itself to readiness quite like necessity. Every contact center adopting AI does so with the intention of solving for immediate challenges. These can include unpredictable call volumes, understaffed or misused agents, high costs, high wait times, low CSAT, and more.

- **Predictable ROI:**

Perform a thorough cost-benefit analysis. While AI can streamline processes and improve efficiency, the initial investment and ongoing maintenance costs should be clearly justified by the expected gains in customer satisfaction, operational efficiency, and cost savings.

- **Stakeholder buy-in:**

Clearly communicate the value of AI to the stakeholders involved using the impact projections tied directly to their goals. ROI and hiring savings, for example, are always top of mind for finance and operations, whereas CSAT may matter most to CX leaders, and integrations for IT stakeholders.

- **Integration-ready tech stack:**

Evaluate the compatibility of your current systems with AI technologies – or find a solution that is platform-agnostic. Seamless integration is crucial to ensure that AI complements existing processes rather than disrupts them. Assess whether your APIs, CRM, CCaaS, and telephony stack can effectively incorporate AI features.

- **Security and Compliance:**

AI implementation must align with industry regulations and data security standards. Assess the compliance measures needed from an AI solution in order to accommodate your customer information and regulatory environment.

- **Target use cases:**

Early adopters always share some idea of the use cases that would most benefit from automation. These can range from simple flows like caller authentication all the way to end-to-end requests like scheduling an appointment. The common theme is always that the use case is high in volume, repetitive, and not where agents should be spending time.

- **Urgency:**

It's important to understand that AI is not an all-or-nothing proposition. In fact, almost every early adopter starts small and scales to new use cases over time. Most contact centers that have adopted AI began by automating a fractional volume of a single call type, and began organizing and scaling around those learnings.

Behind the question “Are we ready?” is the simple truth that few contact centers who have adopted AI actually felt ready. What was true, however, is they had one of two things: Acute challenges that had to be solved; or, a strong desire to gain a competitive edge.

Armed with these motivators, readiness often takes a backseat to necessity. By focusing on outcomes rather than perceived obstacles, the path forward becomes clearer.

## Learnings from early adopters:

With years of experience launching AI at some of the world's biggest contact centers, we've accumulated invaluable learnings from millions of automated calls and dozens of design-centric implementations.

Many leaders at some of the most innovative contact centers have shifted their views on automation entirely after experiencing unprecedented impact with AI:

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Automation has come a long way in the last 15 years. We're way beyond the traditional, 'if you have a question about this, press three.' Through automation and conversational AI, you can get to simply 'how can I help you today?'"

–Kirk Hartman,  
VP of Customer Service, ASH

 American Specialty Health.

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Before AI, nurses were spending time on non-clinical intake. Now, they can immediately begin injury assessments, just like doctors can step into an examination room and know exactly who the patient is."

–Cindy Gambosh,  
Director of Workforce Automation, CorVel

 CORVEL

“

AI and automation have taken seasonality out of the equation for us. No matter how much call traffic we have - whether it's 1 call or 10,000 calls - AI can handle all of them at the same time."

–Mike Bowman,  
Senior Director, Servicing Operations, ECSI

 ECSI  
A Global Payments Company

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“We are doubling down on automation right now. If there was to be an economic downturn and budgets happened to be cut, we are prepared for them and would still be able to fulfill our responsibilities to our customers partly due to the ROI we've already seen from implementing AI.”

–Lisa Rivier,  
Senior Director of Operations & Strategy, AAA



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“Agents that used to do these first level calls are now doing much more interesting things and staying with us and really wanting a career with CAA and thinking ‘they really care about me and my mental health.’”

–Tanya Weigelt,  
AVP - Automotive, CAA Club Group (CCG)



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“What are you waiting for? When I think about automated processes and the logistics of the work that agents do, any way to increase employee satisfaction is a great investment where I think the return is astronomical – where agents are going to stay longer.”

–General Manager,  
Top 5 US Transit Agency

Readiness for AI in a contact center is a multifaceted process. By meticulously evaluating your tech stack, understanding your customers, and addressing specific challenges, you can make informed decisions that align with your organizational goals and enhance the overall customer experience.

But, like any new technology, no amount of planning prepares a contact center for the future quite like learning by doing.

# Choosing a Strategy

Before we get into the steps of a design-centric AI roadmap, it's important to note that no project is the same. Contact centers are all different, reflecting their unique customers, employees, and business' natural disposition to technology.

As such, there is no one size fits all approach. The first decision usually comes down to choosing an approach. But, regardless of strategy, **AI and automation should always be based on one goal: Resolution.**

Resolution rate directly correlates to how successful your automation efforts are. A high resolution rate lowers call volumes for agents, eliminates wait times, increases CSAT and ultimately reduces costs.

Let's go over the three different types of strategies you may consider, and the impact of each on resolution:



## Strategic partnership

One of the primary advantages of buying a solution from a trusted partner is mitigation of risk and speed of implementation. Experienced partners have well-established, pre-built solutions that can be quickly integrated into your existing infrastructure with proven resolution rates. They come with conversational design, dedicated success teams and require minimal resources from your end. This leads to faster time-to-value and immediate access to advanced features and functionalities. Additionally, relying on a trusted partner reduces risk with security measures, ongoing support, updates, and maintenance.





## Add-on solution

A middle-ground option is to purchase a DIY solution that offers a balance between customization and pre-built elements. These solutions are often add-ons to a CCaaS solution, with an interface that allows organizations to configure AI themselves. While DIY solutions can seem straightforward, they are limited in their conversation accuracy and flexibility. Organizations might still face limitations in terms of unique requirements or specific functionalities. Additionally, the level of ongoing support and updates may vary, requiring careful consideration of the resources you'll need and resolution rate you'll achieve.



## In-house build

Building a contact center solution from scratch provides complete control over the features, integrations, and scalability of the system. However, it comes with the risk of underestimating the complexity of the project, leading to cost overruns. Maintenance and updates become the sole responsibility of the organization, which can be resource-intensive over time. Additionally, achieving the same level of expertise as dedicated solution providers can be challenging. This approach is usually reserved for organizations with dedicated AI budgets and teams, with the willingness to wait for long development and testing cycles.

# Executing a Design-Centric Roadmap

As a strategic partner, the following roadmap is a tailored strategy led by Replicant's implementation, delivery and conversation design experts alongside an organization's contact center, CX and IT leaders.

The roadmap is battle-tested to minimize risk, maximize speed, and prioritize the end customer; it can be used to provide contact center and senior leaders with an idea of the steps and resources involved in deploying a proven, resolution-focused AI solution alongside an experienced provider.

## 1. Kickoff.

During kickoff, the stakeholders and key resources of the project are confirmed along with the use case(s), timeline and goals and metrics of the implementation. A thorough review of the ROI model is coupled with the project methodology. This step typically takes place alongside telephony, integrations and business stakeholders, and can be accomplished in just a few hours.

## 2. Discovery & Design.

Over the next four weeks, stakeholders convene, typically twice a week, to analyze call recordings, document APIs and telephony scenarios, and begin developing the specs of the AI design. Goals at this stage include aligning integrations, connecting with accurate data systems, and complying with your security and privacy standards. The final step is achieving sign-off on the design specs.

## 3. Build.

A combination of integrations, testing, and conversation design, the Build phase is a crucial stage. Here, the structure of communication, both functionally and technically, at all possible turns between a human and machine, takes shape. This includes words said, situations, contexts, responses, entities, prompts, and more – all tailored to your unique business. The Build typically lasts around six weeks.

#### 4. User Testing.

A fully designed and built solution is typically ready for testing after just a couple months. At this stage, the end-to-end architecture and connectivity between telephony, AI and all relevant APIs is stress-tested in a sandbox environment. Test scripts and A/B tests are run and any improvements are triaged and prioritized prior to go-live.

#### 5. Deployment.

Go-live day is where just over two months of design and build come to life. From here, calls are observed, data begins accruing, and callers begin receiving no-wait resolutions to their most common questions – all handled by AI. Proactive call monitoring continues to identify any enhancements, with reports and continuous improvement beginning immediately. Finally, the project is moved to customer success teams to begin scaling and brainstorming further use cases.

AI, which has the potential to transform contact centers more than any previous solution, shouldn't feel like a risk. With a trusted solution provider, what might seem like a daunting undertaking can be a manageable and risk-free decision.

A collaborative partnership instills confidence with deep expertise, close guidance and ongoing support beyond the implementation process, ensuring that CX leaders can focus on leveraging the benefits of AI rather than being overwhelmed by the complexities of implementation.

### Calculate the ROI of AI in your contact center

Estimate how much you'd save by automating customer service calls with AI.

[ROI Calculator](#) ↗



# Conclusion

With each new advancement, AI is rapidly becoming a ubiquitous priority at every contact center. Whether you're preparing for a busy season, recovering from a short-staffed year, or anticipating shrinking or stagnant budgets, there's never been a better climate – or option – to push your technology stack forward than there is today.

By 2026, [Gartner predicts that AI deployments will reduce contact center costs by more than \\$80 billion](#). After decades of solutions that aimed to either deflect customers to self-service or push agents to answer even more calls, AI presents the opportunity to resolve more calls at scale.

The result: fewer tradeoffs. Between your agents' experience, your customers' satisfaction and the all-important bottom line, AI is delivering positive outcomes for each priority – without compromising any.

Regardless of your organization's perceived readiness, customer service leaders that find a way to make AI part of their tech stack sooner will be best positioned to bring short and long-term success to their contact center and career.

Replicant offers a free call assessment to help you identify top call drivers and key use cases for automation.

[Get in touch to learn more](#)