The Steps CX Leaders Must Take for GenAI Adoption

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For too long, customers have been let down by companies with outdated customer service processes. And with increasing demand for great service experiences, companies are being pressured to act now or risk losing profit. Recent industry research indicates that 69 percent of customers say they're likely to switch brands based on a poor customer experience and 84 percent say they're likely to recommend a brand based on a great customer experience. Quite simply, a great experience can be the difference between lost and loyal customers. As a result, many leaders are turning to AI and generative AI, recognizing its potential to speed resolution times and reduce friction. A recent EY survey asked 1,200 CEOs if they will invest in GenAI and almost 100 percent said yes.

Tools like AI-powered virtual assistants are paving the way for a new era of customer and agent experiences. Generative AI-powered capabilities like case summarization save agents time while improving the quality of case reports for the most critical hand-offs. Post-call summarization helps encapsulate call transcripts right as a call ends, so agents can wrap up inquiries fast and have more time to manage interactions. However, folding generative AI into the customer service process is proving easier said than done. While a large percentage of leaders have deployed AI, a third of business leaders cite critical roadblocks that hinder future GenAI adoption, including concerns about user acceptance, privacy and security risks, skill shortages, and cost constraints.

To successfully adopt GenAI, CX leaders need to do three things: invest in a single platform, prioritize training and change management, and deploy self-service solutions.

Invest in a Single Platform

For years, business leaders have invested in multiple point solutions, resulting in fragmented processes, siloed systems, and disconnected data. Agents continue to be frustrated with the "swivel chair" problem: constant app switching and wasting time on routine tasks. On the other hand, customers are tired of repeating their inquiries to a never-ending cycle of departments and agents. This complexity creates confusion and slows down case resolution.

Every customer interaction — whether it's resolving a banking dispute, tracking a missing package, or filing an insurance claim — requires coordination across systems and departments. Connecting these disparate systems is critical. Being required to have multiple interactions before a full resolution is achieved is a top frustration for 41 percent of customers.

Siloed, disconnected systems become an even bigger issue when companies begin investing in AI and generative AI, which is why many companies are reevaluating their technology stack. According to Accenture's 2024 Technology Vision report, 95 percent of executives believe generative AI will compel their organization to modernize their technology architecture. Many are turning to trusted platforms.

An integrated platform connecting every system is the first step to achieving business transformation with GenAI, because GenAI is only as powerful as the platform it's built on. It requires a single and secure data model to ensure enterprise-wide data integrity and governance. A single platform, single data model can deliver frictionless experiences, reduce the cost to serve, and prioritize security, exceeding customer expectations and driving profits.

Prioritizing Training and Change Management

Executives estimate that 40 percent of their employees will need new skills in the next three years due to GenAI implementation. Critical to GenAI implementation is upskilling and reskilling agents for the inevitable changes in their roles. This includes building both soft and technical skills.

Soft skills are foundational to the customer experience. People want to talk to other people, and customers value empathy along with speed and efficiency: 77 percent of customers believe an empathetic agent is an important aspect of a customer service experience.

CX leaders that don't think about the human relationship are missing a key piece of the customer service puzzle. This is especially important considering 69 percent of customers prefer live agents over chatbots. Training agents on people skills like active listening, empathy, and patience in the call center, while implementing AI, makes all the difference.

Just as important is developing the technical skills required for GenAI. Successful GenAI implementation requires change management to guarantee the workforce understands the benefits of GenAI and has the skills to utilize the technology. Involving agents early in the process by providing training and executing pilot tests of the solutions to achieve buy-in is essential to effective AI adoption. By educating agents on using these solutions, agents can feel comfortable with the technology before implementation.

Showing agents how technology can further augment their work is also vital. AI-powered solutions can provide real-time recommendations and prompts to agents handling live customer requests, promoting conflict resolution and a customer-first mindset. After calls, AI can analyze the transcript to decipher any patterns and areas for improvement, enhancing the process for similar customer service inquiries in the future. And automation can ensure agents aren't bogged down by routine tasks, so they can focus on delivering personalized interactions with their customers.

Deploy Self-Service Solutions

Although many customers still prefer connecting with live agents, especially for more complex issues, younger generations are increasingly turning to self-service options. The 18-to-34 age group prefers self-service at nearly twice the rate of respondents aged 55 and older.

Self-service options enable customers to resolve their issues independently, which saves them time and reduces frustration. Agents can see significant reductions in call volumes and support requests, allowing them to focus on more complex and high-value tasks.

As organizations adopt GenAI, the integration of self-service solutions becomes even more critical for agents and customers alike. Effective self-service tools, built on an automation platform and enhanced by AI, can provide quick fulfillment of customer requests without agent involvement such as password resets and crediting missing rewards points. In some cases, they can even resolve complex issues like modifying a business order, complementing the work of live agents rather than adding to their burden. By leveraging generative AI-powered chatbots, self-service tools can understand human language, improving the overall customer experience.

Incorporating self-service solutions as part of a broader GenAI strategy allows organizations to balance automation with human interaction. This ensures that while AI handles routine inquiries, live agents are available for complex problem-solving or sensitive topics, enhancing both customer satisfaction and agent productivity.

Real World Success Stories

BT Group, one of the U.K.'s leading providers of telecommunications services, is using GenAI in an early pilot program for 300 agents. The technology is already improving agent responsiveness and creating better experiences for agents and customers alike. For example, GenAI-powered case summarization is reducing the time it takes to generate case summaries — an important, but historically manual task — by 55 percent, and is also enabling a more seamless agent handoff experience, reducing the time it takes to review complex case notes also by 55 percent. This pilot reflects a growing trend in the industry, where AI tools are increasingly utilized to enhance efficiency and support customer service representatives in their daily tasks.

Looking Toward the Future

Successful GenAI implementation takes a great deal of work. Committing to a multifaceted approach centered around one unified platform is the only way to orchestrate the entire tech value chain, including people, processes, and data. At the same time, CX leaders must focus on reskilling and upskilling the workforce, equipping agents with the right self-service tools, and

keeping them at the core of call centers. By prioritizing people and technology, companies can maximize the customer experience with GenAI. The ROI from this approach is already being seen, and it's clear that infusing GenAI in the customer experience is one of the best investments an organization can make.