
The 3 Phases of Introducing AI in CX



A Walk, Crawl, Run approach to introducing AI to
your Customer Journey

73% of customers expect to start on one channel and continue seamlessly on another, but fewer than 35% of companies can deliver it
(Salesforce, Forrester)

Journeys no longer run in a straight line through a call center queue. They flow across voice, chat, text, and self-service, with little room for error.

Creating a consistent experience across channels is no longer a nice to have, its a necessity to match rising expectations.



Three Phases of AI Projects

AI is reshaping how journeys unfold, and adoption typically progresses in three distinct stages.

Conversational AI

Rules-driven Bots and Voice systems that use natural language understanding to handle common, repetitive requests. Customers self-serve for basic needs, reducing wait times and agent load.

Generative AI

Dynamic systems that interpret intent free-form language and respond naturally. These eliminate rigid menus and enable fluid conversations across channels, reducing friction and improving satisfaction

Agentic AI

Autonomous systems capable of acting on behalf of the business. Able to complete tasks, trigger workflows, and coach agents in real time.

Now Including: Proactive Outbound AI-Driven Call Campaigns.



Conversational AI

These tools use natural language understanding to replace rigid menus with simple, rules-driven interactions.

They are not fully dynamic, but provide a fast and visible ROI by absorbing high-frequency, low-value repetitive tasks

What it Solves

Long hold times, Rigid menu trees, and Customers repeating information multiple times.

Conversational AI addresses these pain points by automating routine inquiries (balance checks, password resets, order status) and by capturing structured data before passing customers to live agents

Benchmarks

- 25–40% containment rates within the first 90 days of deployment are typical for well-designed conversational bots and IVRs.
- Organizations report double-digit reductions in call transfers, as customers are routed more accurately.
- Wait times and queue abandonment decrease when simple tasks are resolved without agent intervention.

Industry Adoption

- 70% of enterprises using some form of chatbot or IVR automation (Gartner). However, most implementations remain narrow: FAQs, scripted chat flows, or basic IVR containment.
- Many organizations stall at this stage, unable to move beyond simple interactions — which creates frustration when customers encounter its limitations.



Generative AI

Instead of relying on rigid scripts, these Gen AI systems understand free-form input and respond in natural language.

The result is a more fluid interaction that feels closer to a real conversation, regardless of channel.

What it Solves

Long IVR menus, Repeated questions, and Channel hand-offs that lose context.

Generative AI removes these barriers by allowing customers to express their needs naturally, preserving intent across channels, and generating consistent, policy-aligned responses in real time.

Benchmarks

- 15–20% reduction in average handle time when generative assistants guide discovery and qualification.
- 20–30% improvement in customer satisfaction from faster, more natural conversations.
- 10–20 point increase in containment compared to scripted bots

Industry Adoption

- Around 25% of enterprises are piloting generative AI for customer service, primarily in IVR and chat (Forrester).
- Most programs remain in early pilot stages, with scaling slowed by poor data feeds and integration challenges.
- 30% of CX leaders rank generative AI as their top investment priority for 2025 (PwC)



Agentic AI

These systems don't just interpret and respond, they act on behalf of the customer or the business.

They can initiate workflows, complete transactions, and provide real-time support to human agents.

What it Solves

Missed follow-ups, Manual after-call work, and Outbound campaigns that drain agent time.

Agentic AI eliminates these gaps by executing tasks, triggering workflows, and proactively engaging customers, ensuring the journey ends with resolution, not delay while taking humans out of the cycle.

Benchmarks

- 15–25% revenue uplift in early deployments, as AI proactively drives conversions and follow-ups.
- 20%+ improvement in appointment conversion and outbound success rates.
- 4–5 minutes saved per call when virtual agents handle repetitive steps and after-call work.
- Contact abandonment consistently driven below 5% in pilot programs.

Industry Adoption

- Fewer than 5% of enterprises have deployed Agentic AI at scale (Accenture, McKinsey).
- Despite limited rollout, leaders piloting Agentic AI are creating material competitive advantage through faster cycle times, higher productivity, and new revenue capture.



Benefits of New Age AI

1

Faster Resolution

AI reduces wait times and shortens handle times, resolving issues on first contact.

2

Lower Operating Costs

Containment and automation free agents from repetitive work, lowering cost per interaction.

3

Higher Customer Satisfaction

Natural, seamless interactions boost CSAT scores and reduce churn risk.

4

New Revenue Capture

AI-enabled scheduling, outbound, and upsell flows generate measurable topline impact.



AI READINESS CHECKLIST

Conversational AI

- ☐ Does your Current System resolve **basic, repeatable requests** without an Agent?
- ☐ Are you tracking **Containment Rate** and **Automation %** as KPI's?
- ☐ Does your Self-Service Experience work on both Voice and Digital Channels?

Generative AI

- ☐ Can customers describe their issue in **Free-Form Language**?
- ☐ Does your system **save context when transferring** from Self Serve to Agent?
- ☐ Are responses **personalized in real-time** or are they from a static script?

Agentic AI

- ☐ Does your AI do more than just respond? Scheduling Changes, Complete Forms?
- ☐ Can your AI initiate interactions or workflows? Upsell, Reduce No Show Rates
- ☐ Do you have clear thresholds for when AI should stop and transfer to an Agent?

0-2 POINTS → EARLY.
3-5 POINTS → DEVELOPING
6-7 POINTS → ADVANCING
8-9 POINTS → LEADER

Is Your Customer Journey Ready for AI?

*BENCHMARK YOUR CURRENT JOURNEY AND SEE
WHERE AI CAN CREATE IMMEDIATE IMPACT.*

