



The Contact Center AI Maturity Model

A Strategic Roadmap for
Transformation



The AI Implementation Paradox

96%

of contact centers view AI as essential to their operations

70-85%

of AI initiatives fail to meet expected outcomes

The Problem:

- Contact centers implement AI solutions in random order based on urgency or vendor pitches
- Data gets trapped in disconnected systems
- Integration nightmares consume IT resources
- Agents juggle multiple AI interfaces during single interactions
- Compliance gaps emerge between platforms
- ROI diminishes as tools work in isolation



Maturity Model Purpose & How to Use

Purpose:

- Transform the overwhelming landscape of AI possibilities into a clear, sequential journey

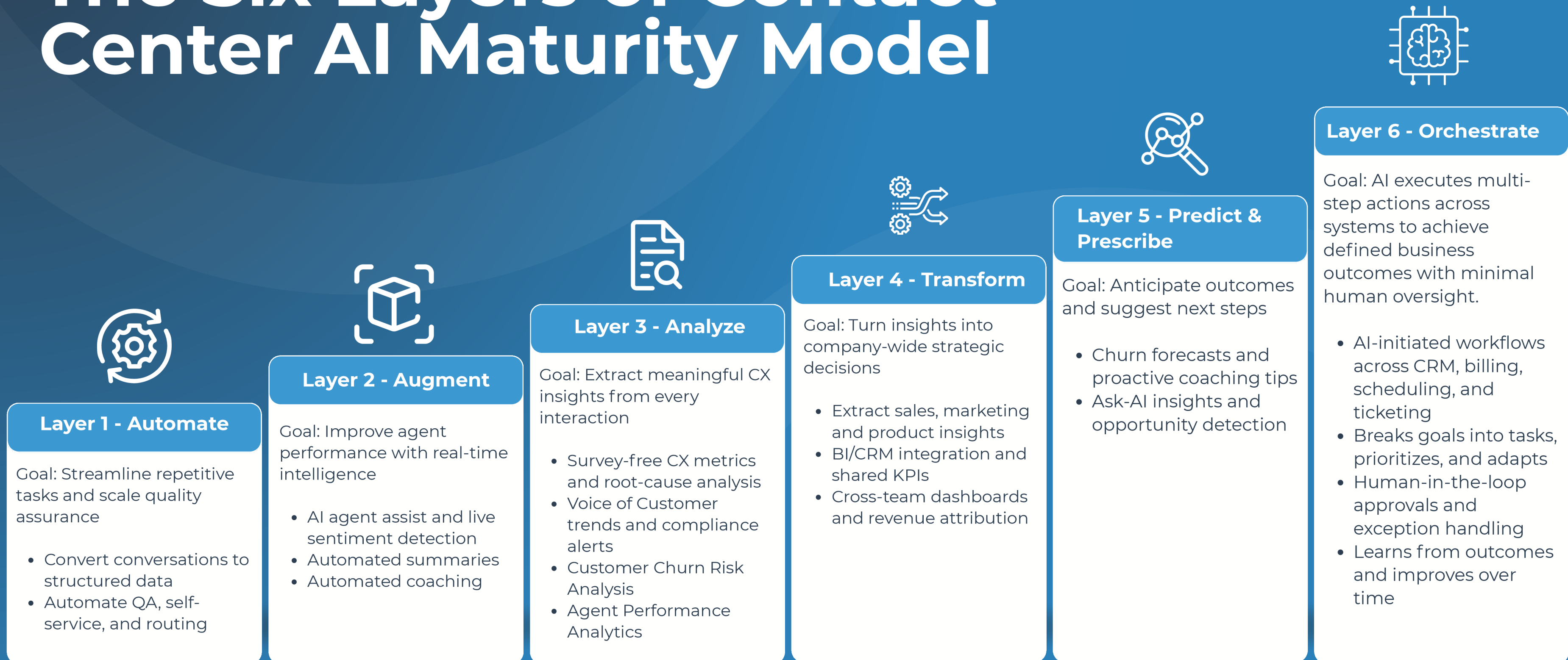
How to Use:

- Each layer builds upon the previous one
- Ensures solid foundation before advancing to sophisticated capabilities
- Eliminates guesswork in AI tool selection and sequencing
- Prevents costly integration failures through systematic building
- Maximizes ROI by ensuring each investment amplifies the others

Foundation Rule: Automated QA must be in place before advancing beyond Layer 1



The Six Layers of Contact Center AI Maturity Model



Layer 1 - Automate (What It Is)

Primary Goal:

Streamline repetitive tasks and scale quality assurance, without increasing headcount

Key Characteristics:

Automated QA

Evaluate 100% of customer interactions for quality, compliance, and coaching triggers

AI Self-service

Deploy IVR, scripted chatbots, and voicebots to resolve common questions before they reach an agent

Smart call routing

Leverage detected intent and sentiment to direct customers to the most suitable agent

Speech-to-text & transcription

Turn every call, chat, and message into structured, searchable data

Data redaction & compliance controls

Automatically remove sensitive data for PCI, HIPAA, GDPR compliance



Layer 1 - Automate (Who Benefits)

Primary Beneficiaries:



QA & Compliance Teams

- Complete visibility into performance
- Eliminate random sampling and manual redaction
- Remove audit headaches



Operations & Workforce Management

- Reduce handle time and get process efficiency visibility
- Save supervisor resources on manual evaluation
- Free agents from repetitive queries



Agents

- Focus on complex, high-value conversations
- Receive unbiased evaluations that boost morale



Customers

- More personalized service
- Faster, more accurate resolutions for routine needs



Layer 1 - Automate (Next Steps & Ready to Graduate)

Actions to Advance:

1. Translate manual into automated scorecards and tune until frontline leaders trust results
2. Build business case for automated scoring with goals, timeline, and budget
3. Expand self-service coverage to top 5-10 most common contact reasons
4. Validate intent- and sentiment-based routing against business outcomes
5. Check AI policy and data governance rules with security team

Ready to Graduate When:

- ✓ Automated QA, self-service bots, and smart routing are reliable across all primary channels
- ✓ Structured, compliant interaction data is consistently available for analysis
- ✓ Governance and budget are in place
- ✓ Leadership is asking for deeper insights than basic automation can provide



Layer 2 - Augment (What It Is)

Primary Goal:

Improve agent performance, productivity, and customer experience with real-time intelligence

Key Characteristics:

AI Agent Assist

Prompts, answers, and next-best actions appear in real-time during calls/chats

Call summaries and metadata

System writes brief recap and extracts reason, outcome, and mood—no typing required

AI knowledge base

Common questions become fresh FAQs and help documents

Auto-categorization

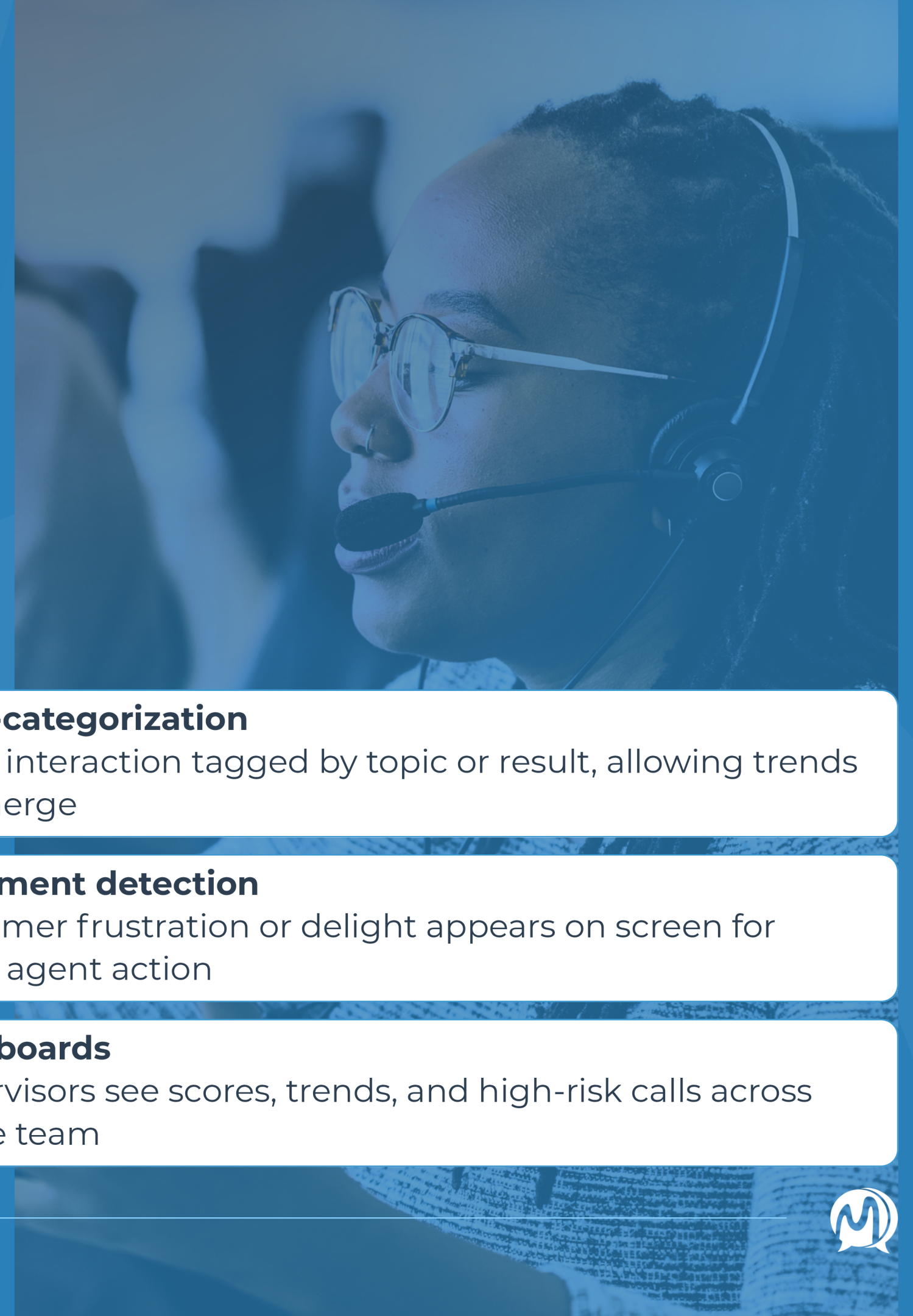
Every interaction tagged by topic or result, allowing trends to emerge

Sentiment detection

Customer frustration or delight appears on screen for quick agent action

Dashboards

Supervisors see scores, trends, and high-risk calls across whole team



Layer 2 - Augment (Who Benefits)

Primary Beneficiaries:



Agents

- Real-time prompts and automated call notes boost confidence
- Built-in AI coaching reduces busywork and accelerates handling times
- Focus on solving problems, not paperwork



Businesses/CX Leaders

- Higher agent productivity means lower staffing spend
- Live sentiment cues protect customer-experience quality



QA & Supervisors

- Instant call scoring and trend dashboards pinpoint who needs which skill boost
- Coach instead of hunt for calls



Customers

- Quicker, more accurate resolutions and smoother overall experience



Layer 2 - Augment (Next Steps & Ready to Graduate)

Actions to Advance:

1. Check that AI tips and summaries match quality standards—tweak until trust is high
2. Use auto-categorisation to find repeat pain points and fix them
3. Make sure sentiment flags trigger the right escalations
4. Update AI governance to cover these new tools and data

Ready to Graduate When:

- ✓ Agents rely on AI prompts and summaries every day
- ✓ Supervisors provide focused coaching rather than random sampling coaching
- ✓ Automated call categorization and sentiment analysis reveal process improvement areas
- ✓ Leadership wants deeper insight—beyond "what happened" to "why it happens"



Layer 3 - Analyze (What It Is)

Primary Goal:

Pull meaningful CX Insights from every interaction and use them to guide action, without the need for expensive data analysts

Key Characteristics:

Survey-free CX metrics

Generative AI calculates Voice of Customer KPIs, including predictive CSAT, NPS, NES, sentiment score, and churn risk

Voice of Customer trends

AI spots what topics matter most this week or month

Root-cause and topic analysis

Calls cluster by pain point, intent, or theme, showing why problems repeat

Compliance and risk checks

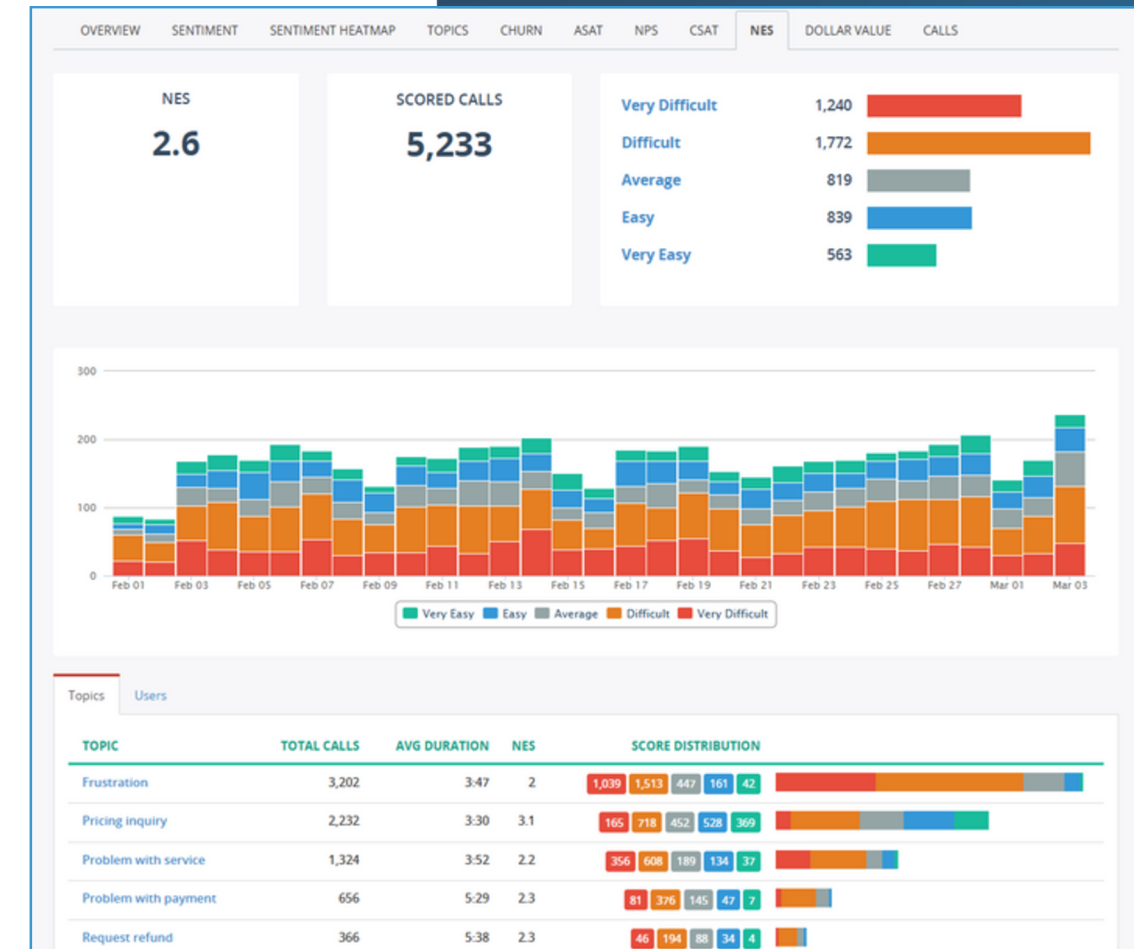
Missed disclosures and policy gaps appear quickly

Churn and revenue risk alerts

At-risk customers and missed upsells are flagged

Agent performance insight

Patterns reveal who needs coaching and on what skill



Layer 3 - Analyze (Who Benefits)

Primary Beneficiaries:



CX and Product Teams

- See the issues driving repeat calls and can fix them



Revenue Leaders

- Catch churn threats and new upsell signals early



Compliance Officers

- Identify risks before they escalate



Coaches and Agents

- Get targeted feedback, not guesswork



Executives

- Base plans on hard data, not hunches

Business Outcomes:

Fewer repeat contacts, higher CX scores, faster fixes, better coaching focus, lower customer churn



Layer 3 - Analyze (Next Steps & Ready to Graduate)

Actions to Advance:

1. Validate model accuracy by comparing predictive CSAT/NPS scores to actual survey results
2. Share root-cause findings with Product, Marketing, and Ops every month
3. Set up alerts for high-risk compliance or churn signals
4. Assign KPI owners for each metric spike to ensure rapid action
5. Integrate KPIs with CRM/case tools so agents can view them on next contact
6. Tie QA insights to CSAT scores and track improvement

Ready to Graduate When:

- ✓ Teams act on insights and can point to wins—fewer repeat calls, saved accounts, closed upsells
- ✓ Compliance issues drop because alerts work
- ✓ Leadership seeks insights within BI and CRM tools, not standalone dashboards
- ✓ Every high-risk KPI spike has an assigned owner and playbook



Layer 4 - Transform (What It Is)

Primary Goal:

Turn AI-generated conversation insight into company-wide, strategic decisions

Key Characteristics:

BI and CRM links

Dashboards pull call data straight into existing reports

Shared KPIs

One view ties QA, CSAT, sentiment, and revenue signals together

AI-driven coaching

System suggests personal training plans for each agent

Product and marketing loops

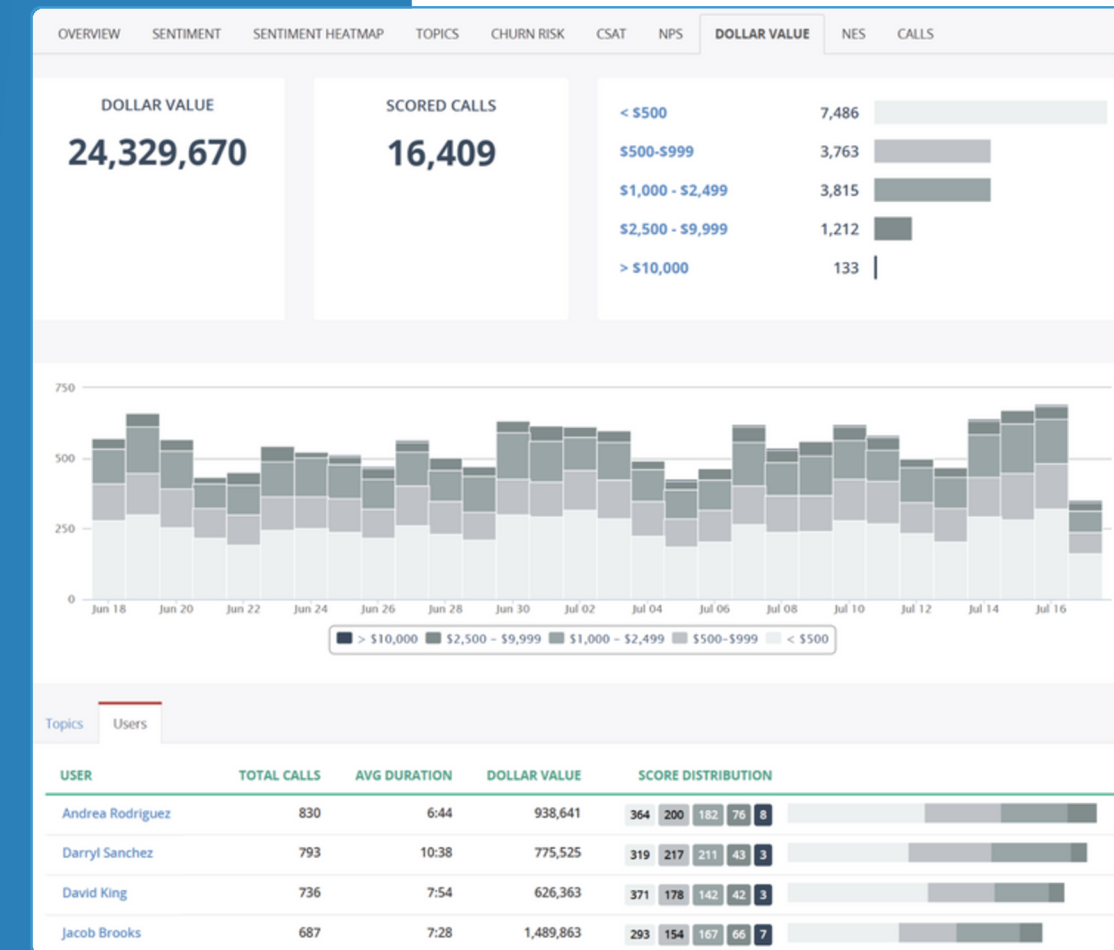
Customer feedback reaches those teams quickly

Revenue attribution

See which calls led to churn, renewals, or upsells

Process fixes

Call patterns show broken steps or self-service gaps



Layer 4 - Transform (Who Benefits)

Primary Beneficiaries:



Executives

- Base plans on clear, joined-up metrics



Product and Marketing

- Gain direct customer feedback to inform roadmaps and campaigns



Revenue Teams

- Insights into common sales objections with AI-generated suggestions to overcome them



Coaches and Agents

- Targeted plans that align with performance and customer experience trends



Ops

- Spot and fix process inefficiencies

Business Outcomes:

Better customer retention, more targeted marketing campaigns, cost reductions through efficiencies, faster product tweaks, better collaboration, recovered revenue from stopped churn



Layer 4 - Transform (Next Steps & Ready to Graduate)

Actions to Advance:

1. Ensure BI and CRM systems pull up-to-date data on regular schedule
2. Provide each team with dashboard addressing its top questions and customized reports
3. Add cross-departmental meeting to workflow to discuss and leverage data
4. Link AI coaching tips to agent goals and pay plans
5. Close the loop: show Product and Marketing what changed after acting on feedback
6. Track revenue gains tied to specific talk tracks or offers

Ready to Graduate When:

- ✓ Several teams utilize conversation dashboards weekly
- ✓ Churn leakage significantly improved
- ✓ CSAT trending positively along with revenue
- ✓ Coaching plans auto-update from live performance data
- ✓ Product or process fixes often traced back to call insights
- ✓ Leadership wants forecasts and "what-if" answers, not just past results



Layer 5 - Predict & Prescribe (What It Is)

Primary Goal:

Act on insights early to keep customers, grow revenue, and avoid unpleasant surprises

Key Characteristics:

Churn and CSAT forecasts

Flag accounts that might leave or score you low

Proactive coaching tips

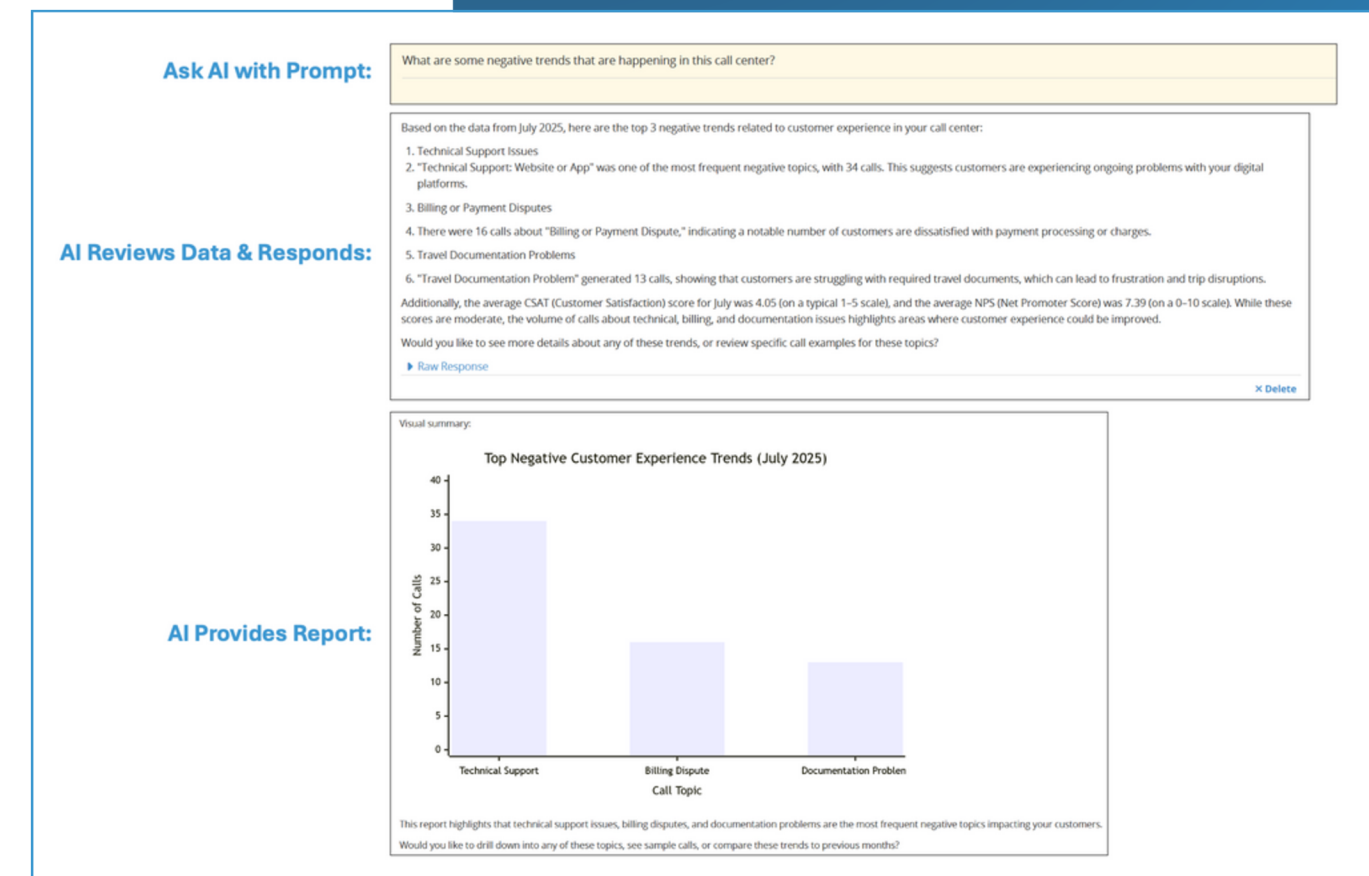
Recommends training steps before performance slides

Opportunity detection

Spot new revenue, service, or compliance chances in the data

Ask-AI insights

Leaders type a question, like "Why is churn up?", and get an instant, clear, data-backed answer



Layer 5 - Predict & Prescribe (Who Benefits)

Primary Beneficiaries:



CX and Retention Teams

- Jump on at-risk customers while there's still time



Coaches and Agents

- Address skill gaps before performance slides



Revenue Leaders

- See new upsell or cross-sell themes early



Compliance Officers

- Handle risks before audit notice



Executives

- Steer strategy with forward-looking facts

Business Outcomes:

Fix problems before they spread, keep good customers, win more revenue, coach the team faster, cut the guesswork in planning



Layer 5 - Predict & Prescribe (Next Steps & Ready to Graduate)

Actions to Advance:

1. Check forecasts against real outcomes; fine-tune until accuracy is solid
2. Build workflows so each alert triggers a task, not just a report
3. Train users on Ask-AI so they can ask questions and receive answers that fit daily decisions
4. Review model inputs regularly to keep them current and unbiased
5. Set success metrics (saved customers, new revenue) and track them

Ready When:

- ✓ Teams trust and act on predictions without second-guessing
- ✓ Alerts launch tasks automatically, and you can show the wins
- ✓ Leadership depends on forward views, not just last month's numbers



Layer 6: Orchestrate (What It Is)

Primary Goal:

Enable AI to execute multi-step actions across systems to achieve defined business outcomes with minimal human oversight.

Key Characteristics:

AI-initiated workflows.

Starts and completes tasks in CRM, billing, scheduling, and ticketing.

Dynamic task planning.

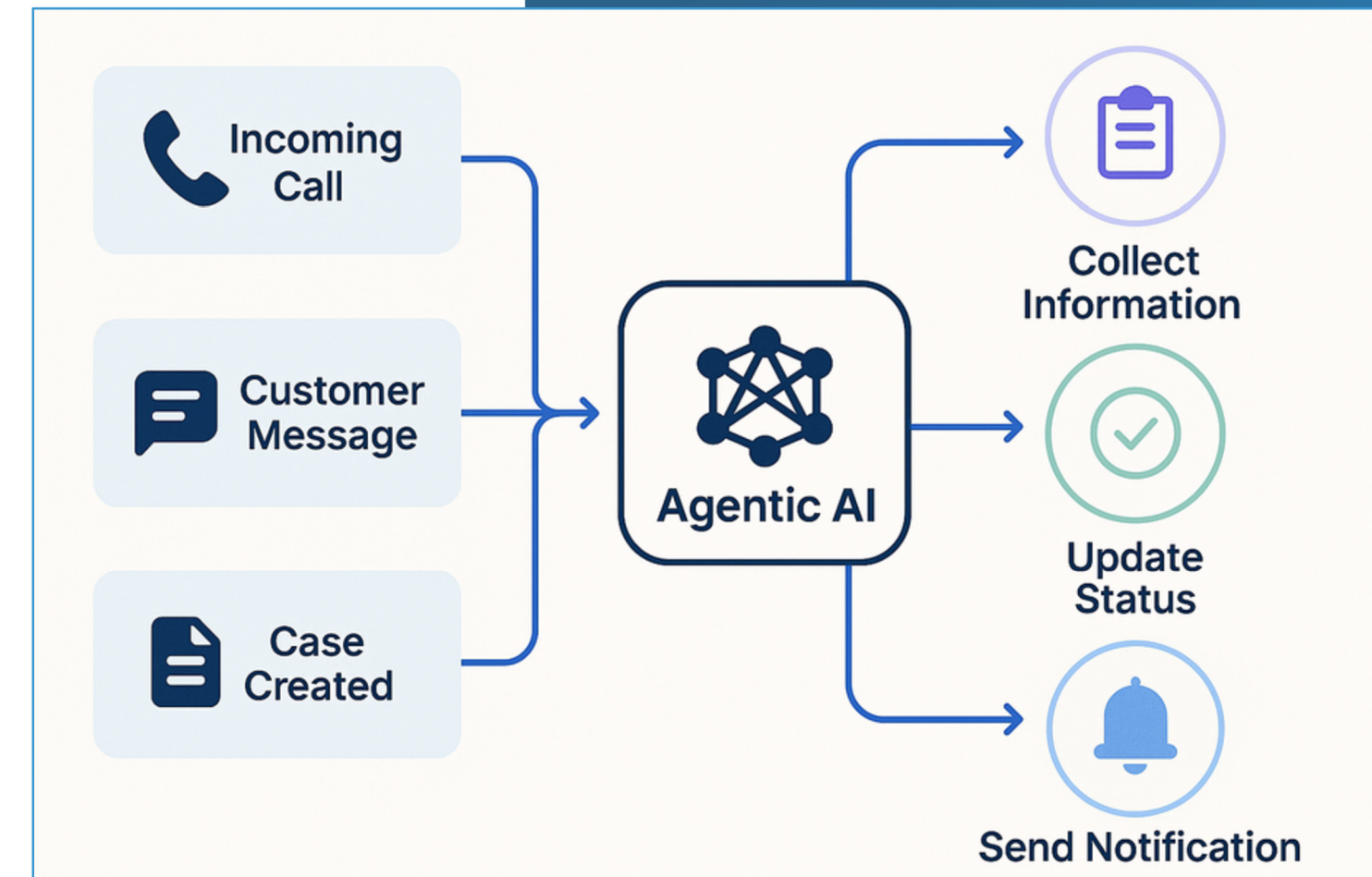
Breaks big goals into steps, orders them, and adapts as it goes.

Human-in-the-loop guardrails.

Uses approvals for sensitive actions and handles exceptions safely.

Continuous improvement.

Reviews outcomes and updates its approach over time.



Layer 6: Orchestrate (Who Benefits)

Primary Beneficiaries:



Operations

- Less swivel-chair work and fewer handoffs.



CX & Retention

- Faster resolutions and timely saves for at-risk customers.



CROs & Revenue Teams

- Consistent follow-through on upsell and renewal plays.



Compliance

- Clear rules, approval points, and an audit trail.

Business Outcomes:

Shorter time to resolution, lower cost to serve, steadier retention and renewals, and fewer dropped tasks across teams.



6: Orchestrate (Next Steps & Ready to Graduate)

Actions to Advance:

1. Pick one safe, high-impact use case. Example: churn-save offers for defined customer tiers.
2. Map the systems and permissions. List which actions the AI can take in CRM, billing, and ticketing.
3. Set guardrails. Define approval thresholds, blocked actions, and an exception queue.
4. Test in a sandbox. Run against past cases; review the audit log and rollback steps.
5. Pilot with tight scope. Start on one segment or queue; measure outcomes and overrides.
6. Close the loop. Feed results back so the agent improves its plan next time.

Ready When:

- ✓ The agent completes end-to-end tasks with few manual overrides.
- ✓ Every action is logged, reversible, and within policy.
- ✓ Teams trust the approvals and exception handling. Outcomes are steady enough to expand to new use cases.



Take Action on Your AI Journey

Discover Your Current Maturity Level

Take our comprehensive 16-question assessment to:

- Identify your exact maturity layer with detailed scoring
- Uncover specific gaps that may be holding you back
- Receive priority recommendations for your next advancement steps
- Discover hidden opportunities you may have overlooked



Assessment takes 5 minutes
Get immediate personalized results

Next Steps:

Take our comprehensive 14-question assessment to:



Take the Assessment

Get your maturity roadmap



Schedule Your Roadmap Discussion

Work with our experts to create your individual implementation plan

Ready to transform your contact center with a systematic approach to AI?

