

# Achieving Frontline Excellence: Balancing Human and AI

Amid increasing investment in self serve and AI, this Good Practice Guide offers help to contact centres looking to balance automation with clear routes to human support – providing practical steps, behavioural quality measures and safeguards to lift satisfaction, cut effort and better support frontline colleagues.

## The Power of Human Connection

Despite the rapid growth of digital channels, human interaction continues to play a critical role in delivering satisfying customer experiences (CX). Research shows that 72% of customers who spoke to a human said it made their experience better, while 77% of customers value human interaction for complex or sensitive issues.<sup>1</sup>

Humans bring judgement, empathy and accountability that are hard to automate. In high stakes moments they are still the surest route to trust and satisfaction.

Starting with a person also creates a 'halo effect': when the journey opens with a brief human triage, customers report higher overall satisfaction, trust and likelihood to recommend – even when resolution continues digitally.

To preserve that halo, access must be obvious and fast. 51% of customers expect it will become harder to reach a real person as artificial intelligence rolls out. Transparency matters: only 26% are comfortable with AI-only decisions – however, comfort rises to 36% when a human reviews the decision.<sup>2</sup>

Failing to balance automation with human contact can accrue 'satisfaction debt' – the cumulative drag on loyalty and future engagement caused by repeated poor or effortful experiences.

It shows up as higher repeat contact, rising complaints and lower trust over time, and it persists even after an individual issue is deemed to be resolved.

## The Emotional Compass

Not all customer needs are created equal. Experience exists on a spectrum, from the simple "what's my current balance?" to the highly complex "how do I plan for my retirement?". Contact centre leaders have to establish which emotional needs require human delivery and which can be effectively automated.

Research highlights there are six key 'forces' that drive positive CX and act as building blocks for stronger customer relationships: fair treatment, certainty, control, belonging, enjoyment and status.<sup>3</sup>

Frontline advisors are uniquely effective at delivering on three of these forces, in particular:

- **Fair Treatment:** Being responsive, explaining decisions in plain language, applying policies consistently, resolving issues quickly and offering clear recourse. To customers, this signals ownership and accountability.
- **Belonging:** Creating inclusive, accessible interactions that reflect context and needs, and avoiding one size fits all scripts. This demonstrates shared values and cultural awareness.
- **Status:** Recognising the person – using their name and history, acknowledging tenure/loyalty, tailoring options to goals and showing appreciation. This makes people feel seen and important.

Contact centre leaders are most likely to enhance customer relationships when they ensure frontline colleagues are the primary contact channels and experiences where these three forces heavily feature – using automation for transactions where efficiency and accuracy are the primary requirements.

## Modelling Behaviour

Traditional quality management approaches based on small samples of interactions can provide limited insight into frontline performance. Advanced contact centres are now using AI to monitor and model advisor behaviour across all interactions, providing a complete picture of performance.

However, the true power of this technology is not just in measurement, but in ensuring any AI is trained to understand how to deliver the same emotional and experiential forces that make human interactions successful.

AI-powered quality management is already able to evaluate 100% of interactions – calls, chats and other channels – to assess performance metrics like empathy, resolution rates and adherence to best practices.

Critically, the technology identifies which advisor traits and behaviours most commonly lead to positive customer

<sup>1</sup> IPSOS (2025). The UK CX Report 2025. <https://www.engagecustomer.com/uk-cx-report-2025>

<sup>2</sup> IPSOS (2025). The UK CX Report 2025. <https://www.engagecustomer.com/uk-cx-report-2025>

<sup>3</sup> IPSOS (2020). The Forces of Customer Experience. <https://www.ipsos.com/en-uk/forces-customer-experience>



outcomes, then uses these insights not only to provide personalised coaching recommendations for human advisors, but also to tune AI agents to replicate these same behaviours.

This approach enables continuous improvement of both customer and employee experiences, moving beyond traditional compliance-focused quality assurance toward a unified framework where human and AI performance is measured and developed against the same standards of excellence that drive customer satisfaction.

### The Sphere of Control

To further ensure continuous improvement on the frontline, advisors must focus on what they can directly control, rather than having to dwell on external factors beyond their influence. The concept of the 'sphere of control' helps advisors understand where they can make the greatest impact.

Within their direct control, those on the frontline can manage their communication style, including tone of voice, empathy

levels and language choices to de-escalate situations and provide positive experiences. They control their call handling process, using techniques like signposting to set expectations at the start of interactions and maintain momentum throughout.

Advisors also control their problem-solving approach by actively listening, asking clarifying questions, and applying their knowledge to find solutions within their authority or knowing when to escalate issues. Their personal performance and development, attitude and resilience all fall within their sphere of control.

Focusing on the sphere of control is an empowering strategy for those on the frontline, helping them to be more effective and engaged in their roles while reducing stress from factors outside their control. Using AI to support – for instance with call summarisation and next-best actions – can further empower advisors to deliver in their sphere of control and reinforce the positive behaviours and actions they take.

### Five Steps to the Human-AI Balance

Contact centre leaders should focus on the following key steps to maximise the impact and capabilities of their frontline teams:

- 1: Identify your experience spectrum.** Reimagine your customer journeys to help ensure your frontline colleagues are being deployed for the right kind of interactions. Use automation for efficiency-focused transactions while reserving human advisors for interactions that require empathy, judgement and relationship building.
- 2: Design handovers to enhance experience.** Route by complexity and emotional need. Make "right to a human" visible in one or two steps. Pass full context at transfer, so no repetition is required.
- 3: Manage what matters.** Move beyond traditional productivity metrics toward measures of friendliness, knowledgeability and understanding. Apply these consistently to both human and AI performance management, using results to drive targeted improvement
- 4: Empower and protect your people.** Give advisors clear authority, knowledge and tools (agent-assist, up-to-date knowledge, checklists) to resolve more in-channel. Protect advisor wellbeing: i.e. with decompression buffers after high-emotion contacts, by capping back-to-back complex calls, offering easy access to support and monitoring burnout signals. Upskill for complex case handling, transparent decisioning and AI literacy.
- 5: Close the loop – coach people, tune models.** Use one behavioural framework for both human and AI. Monitor customer needs and use insights from contact centre interactions to surface coachable moments and teach in huddle sessions, refining AI models with the knowledge.

### Intelligent Orchestration

To achieve emotionally strong customer relationships, organisations must operationalise the differentiating forces of fair treatment, status and belonging, and equip frontline colleagues to act within their sphere of control, creating a system that learns every day.

Frontline colleagues are the heart and soul of your business, and their engagement, morale and satisfaction are paramount

to successful customer experience design and delivery.

Use behavioural insight and AI to sharpen – never overshadow – the human edge, with clear "right to a human" standards and strong governance. Do this well and you will cut effort and repeat contact, lift satisfaction and advocacy, protect wellbeing and lower the cost to serve.