

Delivering AI Project Success in the Contact Centre

With the pace of change and scale of possibility, knowing how and where to start with artificial intelligence (AI) in the contact centre can be a daunting proposition. This Good Practice Guide sets out what separates the projects that thrive from those that stall – and how to build an approach that offers the best chance of delivering lasting value.

The gap between AI ambition and AI delivery can often be a wide one, with under 5% of customer experience-focused AI initiatives reaching significant scale. Failure stories are very rarely just about the adoption of bad technologies alone. In many cases, the technology may have been chosen before an organisation has truly defined the prerequisite strategy, data foundations, change management and governance involved.

Understanding what it takes to move any given AI project from pilot to production is a vital theme for contact centre leaders to explore.

Start with Customer Context

The most common mistake that an organisation can make is selecting an AI solution before understanding the problem that's there to be solved – especially when the AI is potentially customer-facing.

Intent capture and analysis – establishing the root causes for why customers contact your business – may seem obvious, but it's an essential first step that can get overlooked. As a real-world example, when British Airways analysed its contact patterns, seven of its top ten contact reasons were entirely unexpected, even to its own leadership¹. That type of insight enabled precise, targeted automation rather than a costly and unfocused system overhaul.

In another case, a well known fire and security company found that 17% of inbound calls were requests to test alarms – a task that appears critical to customers, but is usually routine, low effort and highly repeatable, and therefore an ideal candidate for automation once revealed through intent analysis.

The principle here is that data-led analysis eliminates guesswork and ensures that AI investments address genuine operational pain points rather than assumed ones. Without this, even well-funded implementations risk solving the wrong problems.

It's also crucial to establish which interactions are not suitable for automation. A useful benchmark is to identify the right 30% of contact types that can deliver approximately 80% of the available automation value. This requires rigorous analysis of contact volumes, complexity and resolution patterns. Getting this targeting wrong means either automating the wrong things – creating friction rather than removing it – or missing the highest-value opportunities entirely.

Build the Business Case

Data provides the foundations from which everything can be built, but a strong, measured business case is what enables meaningful change.

Consider reframing AI from being a technology investment to a business transformation. This shifts the conversation from 'we should do something with AI' to 'here is the quantified impact, here is how we measure success and here is the accountability framework'. That is a fundamentally different conversation and one that is far more likely to sustain senior sponsorship through the difficult middle stages of an implementation.

A robust business case requires some key components:

- Accurate baseline costs to work from such as cost per contact.
- Some clear service metrics to work from such as handling times, repeat contact rates, attrition.
- A realistic model of the transformation economics, with governance and change management costs built in from the start.
- Clearly defined, measurable success criteria.

Projects that only account for technology licensing will fail and often expensively so. Organisations that are not building the foundations now will not be positioned to capture that opportunity. The business case is what creates the urgency and accountability to get started.

Data, Objectives and Guardrails

When AI projects fail, it is rarely simply because the technology did not work. There are five foundational factors that determine whether a project moves from pilot to production:

1. Data and knowledge quality

While AI is only as good as the data it learns from – and siloed systems, inconsistent formats and inaccessible data can damage a project – organisations do not necessarily need perfect data to begin, and many teams make progress by focusing on a limited set of high value, accessible content, refreshing only what the AI needs to handle specific queries. Auditing the current knowledge landscape helps prioritise these opportunities, enabling momentum while wider data and knowledge improvements are tackled over time.

¹ SABIO (2025) How British Airways' Customer Service Is Soaring To New Heights Through Data-driven AI Innovation

2. Clear business objectives

Measurable outcomes must be defined before technology is selected. Whether the goal is improved resolution rates, better containment / lowering deflection or customer effort scores, without specific targets you cannot demonstrate ROI, and without ROI you cannot sustain investment - and you need to know how you will track the metrics before, during and after selection.

3. Integration capability

Agentic AI – the kind that acts on a customer’s behalf rather than simply answering questions – requires connectivity with CRM platforms, back-office systems and knowledge bases. Organisations running legacy infrastructure with limited API connectivity will hit barriers quickly when they attempt to scale beyond basic automation.

4. Guard railing and governance

AI needs guardrails. Hallucination detection, prompt monitoring, tiered autonomy and clear escalation paths are not optional extras, they are the difference between a safe deployment and a brand, compliance or customer trust risk. Regulated industries understand this instinctively and it is vital that any AI project is worked on in conjunction with governance and risk stakeholders within your organisation.

5. People readiness

This can often be the most underestimated factor in AI implementation. Technology does not transform organisations, its people do. Skills development, cultural readiness, clear and regular communication and sustained performance management through a challenging change curve are what determine whether investment delivers lasting value or becomes another cautionary tale.

The Five C’s

Establishing your people’s readiness for AI within your organisation can be aided by adopting the ‘Five C’s’ framework, which provides a selection of vital change principles for the human side of transformation.

1. **Clarity.** Articulate the why and how of an AI project, at every level. A vision that lives only in the boardroom is not a vision.
2. **Communication.** Provide an ongoing, two-way conversation - not a launch announcement. Rumour fills the vacuum that poor communication leaves behind.
3. **Collaboration.** Transformation built with people creates ownership. Make it clear that it might take at least six months for sustainable adoption of the technology you’re proposing.
4. **Culture.** Teams need psychological safety to experiment and learn without consequence.
5. **Commitment.** Protect dedicated training time. Plan for productivity dips. Budget for optimisation, not just implementation. Expect a six-to-eight week embedding period and treat adoption data as a live performance metric throughout.

Prepare for AI Readiness

Ultimately, it is vital to adhere to the following steps in order to build AI capability that delivers operational and human benefit:

1. Prove value quickly, then scale. Rather than committing to organisation-wide transformation from day one, aim for a more focused pilot that delivers measurable outcomes within a shorter timeframe - then use that evidence to build confidence and secure more sustained investment.

2. Measure adoption, not just deployment. A system can be technically flawless and still fail if people don’t use it effectively, so expect an embedding period and treat adoption data as a live performance data throughout.

3. Design for growth, not reduction. When AI automates routine demand, it creates capacity – freeing your advisors to do more of what they do best. Whether that means resolving more queries, deepening customer relationships, or expanding what your business can deliver, AI should become the enabler of greater value, not a replacement for the people who create it.

4. Choose partners who understand operations, not just technology. The right partners for AI projects will help assess readiness, manage integration complexity and guide cultural transformation over time – not simply hand over a configured platform and move on.

5. Maintain flexibility as the landscape evolves. The AI market is moving at unprecedented speed, so an approach focused on business results rather than specific tools reduces risk and keeps options open.