



EBOOK

The State of AI in Customer Experience 2025

How AI, Human Talent, and Unified
Platforms are Delivering Measurable ROI



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2025

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The AI Value Trio: Assist Humans, Drive Innovation, Solve Hard Problems—All Elevated by a Unified Platform

Make no mistake: Leading companies around the globe are reaping real value from artificial intelligence (AI) implemented for customer experience (CX) use cases, as Metrigy has documented in recent AI and CX research studies¹. The benefits, ranging from agent efficiency improvements to revenue growth and well beyond, are amplified when combined with a unified platform that brings together CCaaS and UCaaS, along with CRM.

In this report, discover how CX leaders are achieving measurable success by applying the perfect mix of AI and human agents across a unified ecosystem to support their customer service interactions.¹

73%

AI already brings significant value to their companies

81%

of companies buying AI from their contact center platform providers see significant value from AI

AI Innovation and Sophistication are Growing

83%

AI improves the ability to innovate

79%

AI is solving harder problems for their companies today than a year ago

3 Top Ways AI Brings Value*

42%

Helping humans be more productive

30%

Fully automating functions, including workflows and self-service capabilities

28%

Providing analytics and insights

*Selected as top-ranked value



All of these factors are contributing to advanced features and capabilities like:

- Hyper-personalization at scale
- Proactive and predictive outreach
- New self-service experiences with guided intelligence
- Consistent, AI-driven customer journey orchestration across platforms



¹Customer Experience MetriCast 2025 (1,397 companies); AI for Business Success 2025-26 (1,104 companies); Participants at companies with 500+ employees in U.S., U.K. and IRL markets.



Driving Positive Return on AI Investments

AI is no different from other CX and IT technologies; companies want to ensure their investments are resulting in measurable business benefits. According to Metrigy's research, the news is highly positive for AI, even for companies expecting a quick return. Notably, bringing together a team of people to provide expertise, best practices, training, and guidance for AI decisions in the form of an AI Center for Excellence (AI CoE) is a proven way to ensure business gains from AI across the company.

>72%

of companies buy AI as part of their contact center license

33%

buy AI only with a contact center agent license

23%

buy AI with a contact center license and as a supplemental purchase from another provider

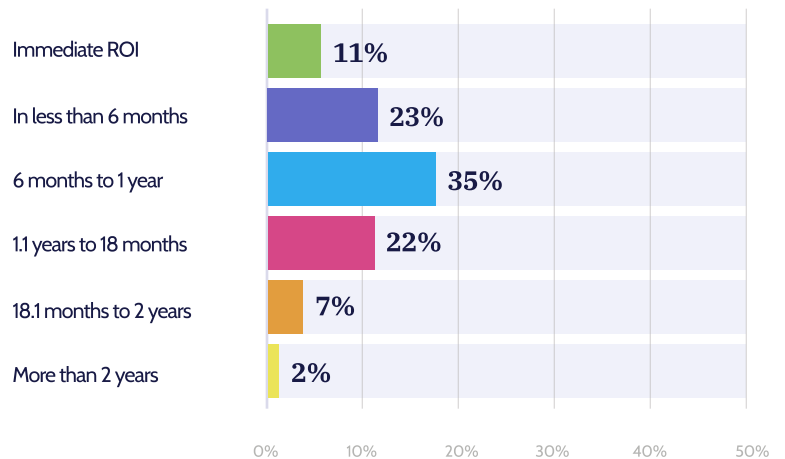
64%

say AI benefits already outweigh the spend

Quick Time to ROI

69%

Expect Return in a Year or Less



AI CoE: Shepherding Positive Change

40%

of companies have an AI CoE now

53%

of companies are planning an AI CoE

AI CoE



A team of people with complementary skillsets and responsibilities who provide expertise, best practices, training, and guidance for AI decisions. The team tracks technology innovations and how they apply to the company to gain efficiencies and drive additional business metrics, including revenue, profitability, customer satisfaction, and employee loyalty.



Measuring AI's Transformative Power

CX leaders measuring AI's impact on business success metrics like customer satisfaction, revenue, costs, and productivity have reported compelling results. Those not measuring must start—doing so is crucial for demonstrating tangible ROI and securing continued investment in AI initiatives within the contact center. Additionally, **without clear insights into AI's value, organizations risk underutilizing powerful tools, misallocating resources, and losing competitive advantage to more data-driven peers.** Measuring AI's impact can provide irrefutable evidence of its transformative power.



The Use of AI Results in CSAT & Efficiency Improvements

76%

report customer ratings improvement of 31% on average

63%

see an increase in employee efficiency of 30% on average

AI Positively Impacts the Bottomline & Fuels Growth

61%

report cost reductions of 21% on average

63%

attribute a rise in sales to AI use for a 27% average growth in revenue



Top 5 AI Drivers for Measured Improvement

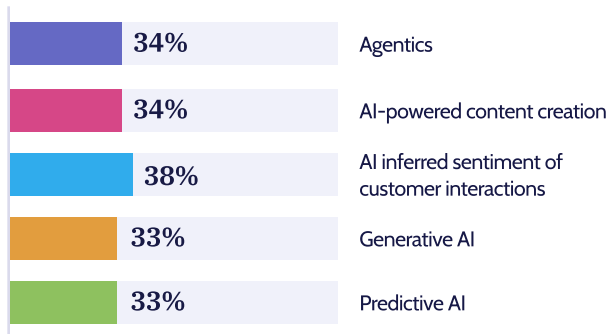
The previous page showed how AI overall impacts CSAT, employee efficiency, revenue, and costs. Here, we look at which specific AI technologies help companies realize the biggest gains across each metric, based on their measured improvements. CX leaders can use this information to guide their expectations on how different AI technologies improve business metrics.

Agentic, AI-inferred sentiment of customer interactions, and AI-powered content creation drive the biggest percentage improvements for each of the four metrics. Generative AI is among the top five for all but “Revenue” and predictive AI is among the top five for all but “Costs”.

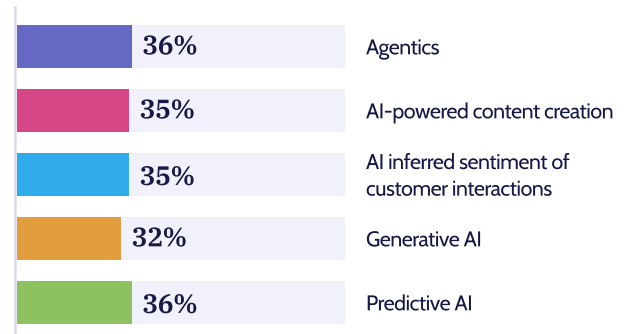


Top 5 Percentage Improvements, by Type of AI in Use

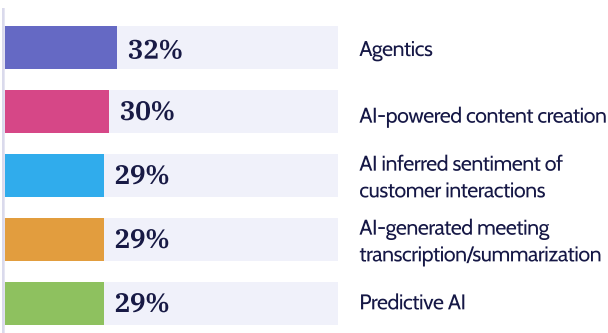
CSAT



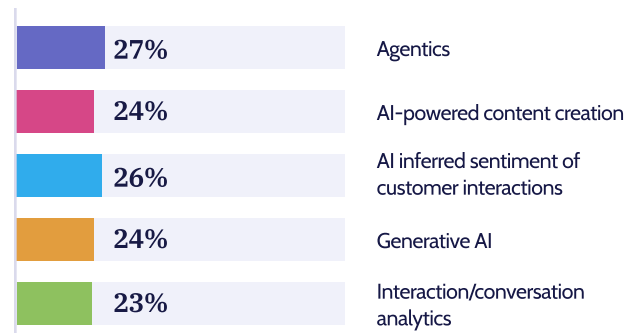
Employee efficiency



Revenue



Costs





Agent Assist Tools Widely Used with CCaaS

56%

of companies are already using agent assist today or planning to begin doing so this year

72%

of these companies use their existing CCaaS provider for agent assist software

Proof Points for Using Agent Assist

64%

have reduced average handle time by 28%

42%

have reduced agent attrition by 29%



Empowering Agents with AI Assistance, Natively

Agent assist is one of the most notable use cases within the AI-powered contact center. It relies on a variety of AI technologies, including generative AI, predictive analytics, sentiment analysis, and others, to serve as an intelligent assistant for human agents. Tapping into billing and payment, customer relationship management (CRM), knowledge management, and other enterprise systems, agent assist tools deliver agents the right information and guidance at the right time. This assures greater accuracy of responses while improving efficiency and more.

3 Reasons to Consider Native Agent Assist



Greater contextual awareness

Agents get highly relevant, real-time information when they need it, without the delays or snafus that come with accessing third-party systems



Unified analysis

All interaction data, along with agent performance metrics and AI-driven insights, is available for analytics and ongoing performance optimization



Seamless knowledge transfer

Context from self-service interactions carries over to live agents, enabling smoother handoffs and more informed, efficient support



Simplified management

A native solution removes the need to manage separate vendors, contracts, or integrations



Agent Assist Pulls Sales Levers



No single use of agent assist stands out as the *raison d'être*. More than half of companies using agent assist do so for four core purposes:

60%

Providing context about a customer or topic

59%

Providing next-best-action recommendations

55%

Transcribing interactions to reduce after-call work

52%

Helping agents upsell/cross-sell

Stay Open to New Opportunities

87%

of companies say AI is already helping generate enough sales to cover the costs of the contact center

77%

of companies believe AI can make anybody a salesperson by guiding them through a conversation

5 Ways Agent Assist Can Help Improve Sales

Empowered with AI assistance, human agents can be more effective and efficient during customer interactions. AI can also help by:

1

Providing real-time product or service recommendations

2

Delivering personalized offers

3

Suggesting conversational prompts for answering difficult questions

4

Guiding human agents through complex scripts and workflows

5

Assuring human agents answer all information and meet compliance requirements

6

Automatically translating between customers and agents



AI Agents Relieve Work for Human Agents

Virtual AI agents, the next, more advanced iteration of chatbots or voicebots, can do for customers what agent assist can do for human agents, directly. Customer-facing AI agents redefine customer experience by providing instant, 24/7 personalized support and self-service, resolving queries efficiently while freeing human agents for complex issues. They elevate satisfaction and drive operational savings by automating routine interactions and offering immediate, accurate information.



64%

of companies are either already using or planning to add AI agents to their contact centers in 2025

Rise of Universal Agents

With agent assist, many companies envision the day when employees can handle service, sales, support, and any issue without having specific training or skillsets. Rather, AI coaches in the moment. Enter the Universal Agent.

35%

Yes, AI will one day fully enable a universal agent

47%

Yes, AI will one day enable a universal agent to some extent

Text agents are used almost universally. Most, but significantly fewer, also use voice agents:

93%

Text AI agents

70%

Voice AI agents

Top 5 Uses of Text AI Agents for CX

59%

Interacting with customers to solve issues

52%

Guiding customers through knowledge bases

51%

Qualifying a sales lead and handing off to a live agent

44%

Triaging customer issues and routing appropriately

42%

Handling processes such as money transfers, order placement, etc.



Pushing the Limits with Agentic AI

Agentic AI takes agent assist and AI agent capabilities to the next level, autonomously understanding complex inquiries, planning multi-step workflows, and proactively resolving issues without requiring human intervention. As agentic AI takes root, CX becomes less about reacting to customer issues and more about self-driven problem solving and proactive outreach.



28%

are using agentic AI today



41%

are planning to implement agentic AI in 2025



Companies using and measuring agentic AI's impact report positive change across key business metrics. Among them:

64%

Greater employee efficiency

60%

Reduced costs

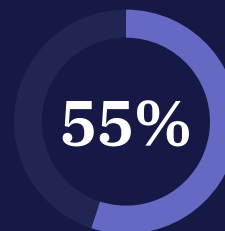
49%

Revenue growth

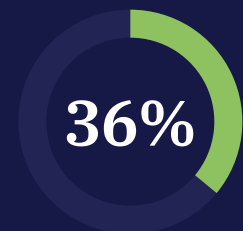
39%

Better CSAT scores

Customer service and sales are among the top three current or planned uses for agentic AI:



Customer service

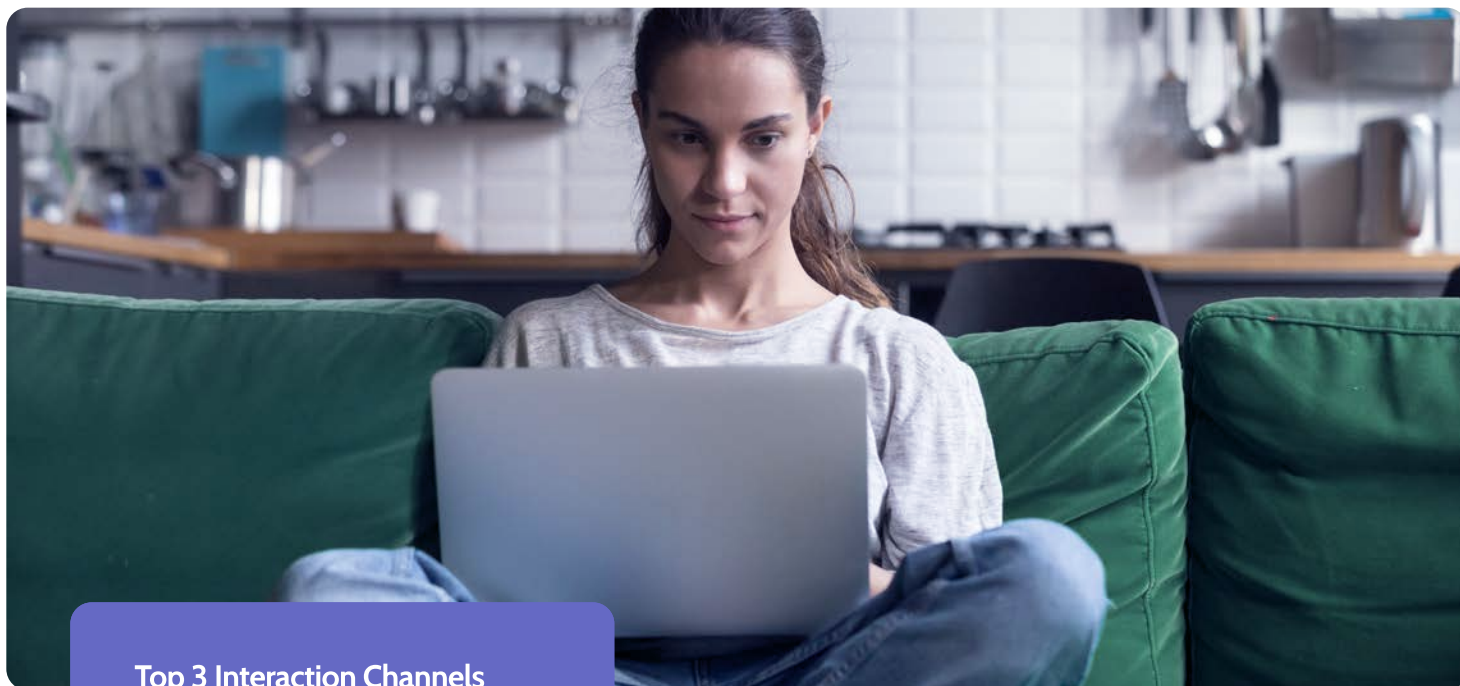


Sales



Big Picture Perspective Through Interaction Analytics

It's one thing to meet customer needs through a variety of interaction channels, but quite another to reap the full value from doing so. To be successful, CX leaders must be able to transform the conversations and interactions within those channels into actionable insights on customer sentiment, pain points, emerging trends, and other key criteria.



Top 3 Interaction Channels in Use Today:



Email

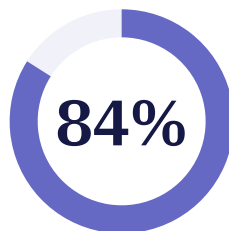


AI text agents

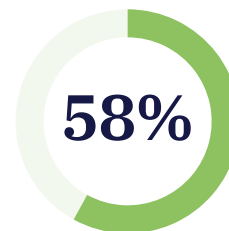


Voice/phone

Interaction analytics is in widespread use for conversations with customers



Customer service



Sales

Two Examples of How Interaction Analytics Comes Into Play



Healthcare



🔍 Problem

Patients frequently express confusion or frustration about their billing statements, leading to repeat calls and lower patient satisfaction with administrative processes.

Interaction analytics at work

- Analysis of recorded calls about billing leads to the discovery of recurring keywords like "explanation of benefits," "deductible," or "out-of-pocket maximum," accompanied by negative sentiment.
- Additionally, the analysis pinpoints specific sections of the billing statement that consistently cause confusion or highlights agents struggling to explain complex medical billing terms clearly.

CX solution

Using findings from the interaction analysis, the healthcare provider understands how to address the situation by:

- Redesigning billing statements
- Creating targeted educational resources (e.g., short videos, FAQs) explaining common billing terms
- Using AI-based coaching to provide specific training to agents on how to effectively demystify medical billing for patients

Benefits

Reduced call volume (and associated costs), improved patient understanding, greater trust.



Retail



🔍 Problem

Online shoppers frequently report "missing items" or "incorrect orders," leading to high return rates and poor customer ratings.

Interaction analytics at work

- Analysis of call transcripts and chat logs identifies a correlation between missing items and a specific poorly packaged product that is overlooked in larger deliveries.

CX solution

Understanding the correlation uncovered from the interaction analysis, the retailer determines how to remedy the situation by:

- Improving packaging procedures
- Using AI to find information gaps in its knowledge management system
- Using crisp and clear AI-generated online product descriptions that include visual cues for separate shipments
- Proactively sending automated notices about multi-package deliveries

Benefits

Reduced call and chat volume, improved first-contact resolution, and improved customer ratings.



Elevating the Experience with a Unified Platform

Integrating CCaaS and UCaaS platforms, along with CRM, offers significant advantages for CX, easing internal collaboration and, as a result, optimizing external customer interactions. AI can further enhance the benefits of an integrated platform.

Examples include:

Directed proactive engagement



With a unified view across CCaaS and UCaaS platforms, AI can better predict customer needs or potential issues, enabling proactive outreach or routing to specialized agents within the business. For example, if a customer is discussing a complex product issue, AI can suggest escalating the conversation directly to an internal product specialist.

Faster issue resolution



When a customer has a complex query, an agent can instantly connect with a relevant subject matter expert (SME) for real-time assistance or a warm transfer, reducing hold times and improving first contact resolution. AI can suggest which SME is most appropriate and available based on the customer's query and the expert's skills/presence.

Advanced agent assist capabilities



AI-powered agent assist tools can leverage internal knowledge from UCaaS (e.g., internal FAQs, best practices discussed in team chats) to provide more comprehensive and relevant real-time suggestions, scripts, and information to agents.

Full view of a customer



Integrating CCaaS with UCaaS, alongside CRM systems, ensures that all customer interactions—whether through the contact center or internal discussions—are captured and available. AI can then build a more complete profile of each customer, including their history, preferences, and sentiment.

The Top Benefits of a Unified Platform: Cost Savings & Customer Collaboration Are the Lead Value Drivers

63% Cost savings

63% Enables agents to use collaboration apps for customer calls

52% Allows agents to connect non-contact center employees to a call

50% Allows agents and other employees to work together to resolve customer issues

45% Unified user interface

Unified Platforms Are on the Rise

33% of companies have already integrated their CCaaS and UCaaS platforms

41% are planning for integration as early as 2025

14% are evaluating whether to unify their platforms

9 Recommendations for Getting the Most from AI for CX

- 1 Formulate a plan to measure success:** If you're not already assessing AI's value generally, technology by technology, prioritize a plan to do so. CX leaders can't show AI's value or justify additional spending unless they're measuring success.
- 2 Identify measurable metrics:** When considering how to measure AI's success, consider top-level business metrics such as revenue growth, cost reduction, employee efficiency, and customer satisfaction, as well as contact center-specific key performance indicators such as average handle time and first-contact resolution.
- 3 Establish goals, and stick to them:** Set aggressive ROI goals, and hold your AI vendors to them. Most expect ROI within six to 12 months.
- 4 Implement AI natively:** Consider tapping into AI capabilities natively integrated into your contact center platform, rather than adding complexity with a third-party implementation. Among the benefits are contextual awareness, unified analysis, and simplified management.
- 5 Consider AI for sales opportunities:** Unify your CCaaS, UCaaS, and CRM platforms, coupled with AI assistance, to provide a connected customer view and seamless journey. AI can assist human agents and self-service customers with real-time recommendations and personalized offers that lead to sales.
- 6 Set up an AI Center of Excellence:** If your company hasn't established an AI CoE, take a leadership role in making this happen. An AI CoE will raise awareness of AI's usefulness across the company, while potentially creating standards for AI technology use, streamlining technology decisions, and ensuring best practices for implementation and adoption. Similarly, if your company has an AI CoE but you're not involved, join in and be an active, engaged participant.
- 7 Make agentic AI a priority:** Introduce greater autonomy through the use of agentic AI. Early adopters already see improvements across their business success metrics.
- 8 Take an omnichannel approach to analytics and act on them:** Apply analytics across interaction channels to glean well-rounded intelligence. But don't stop there. Take action on your findings.
- 9 Move forward with a unified platform strategy:** Integrate your CCaaS and UCaaS platforms to boost internal collaboration and deliver a better customer experience. When combined with AI, a unified platform can add measurable value, such as faster issue resolution, full customer views, and more.

Get More Expert Insights

Find out how to harness AI in the right ways to improve CX and optimize your human talent in this two-part conversation with Amy Roberge, head of global CX solutions at Zoom, and Robin Gareiss, CEO and principal strategist at Metrigy.

→ Watch now

About Metrigy

Metrigy is an innovative research and advisory firm focusing on the rapidly changing areas of workplace collaboration, digital workplace, digital transformation, customer experience and employee experience—along with several related technologies. Metrigy delivers strategic guidance and informative content, backed by primary research metrics and analysis, for technology providers and enterprise organizations.



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