

From contact center to connected experience: Turning every interaction into loyalty

A practical guide for turning every interaction into insight, every insight into action, and every action into loyalty.

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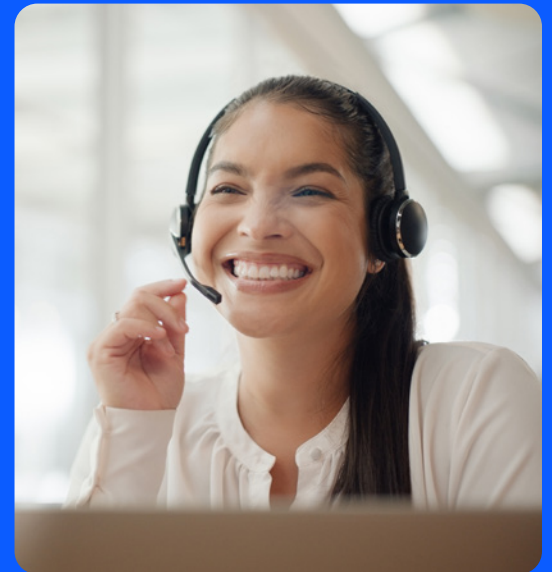


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Introduction

Customer expectations are rising faster than most businesses can keep pace. They're demanding seamless, personalized, connected experiences across every touchpoint. In fact, 80% of consumers consider the experience a company provides as important as its products.¹

That's something many brands are having a hard time delivering, and the research backs it up: Forrester's 2025 Global Customer Experience Index found almost one in four brands saw a decline in CX quality this year.²

There are many reasons for this, but many stem from the shortcomings of the traditional contact center model. Once the frontline of customer engagement, contact centers now struggle to deliver and scale the outcome-driven experiences customers demand. Fragmented systems, siloed data, and disconnected journeys all create friction that frustrates customers and overburdens employees.

To thrive in this challenging new era, organizations must move beyond incremental improvements to build a truly connected experience—one that unites people, tools, and insights across the customer journey.

Why connection matters more than channels

For many customers, it's less about which 'channel' handles their issue and more about getting it solved without friction. Companies use phone, email, chat, and social media to handle their various internal and external comms, and most customer journeys span beyond just one of these channels.

That's given rise to a lot of complexity, prompting companies to deploy AI to automate a multitude of everyday tasks. But as Michelle Couture, global product marketing lead, Zoom Customer Experience, says, "Despite record AI investment, customer experience is not getting better. In fact, it's getting worse." The reason? "When you deploy AI in silos, it doesn't connect the journey. It just makes a broken process move faster."

Customers typically remember the resolution, not which channels they used to get it. Connection-first CX flips the script from managing customer service channels in isolation to building an experience focused on outcomes. It uses AI and automation to connect the dots and, in turn, connect the journey. This reduces the need for customers to repeat themselves so that each interaction builds on the previous one. For example, if your self-service virtual agent can't solve an issue and hands it off to a support rep, a connected approach means that the rep automatically receives the context and can pick up without missing a beat.

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Michelle Couture

Global product marketing lead, Zoom CX



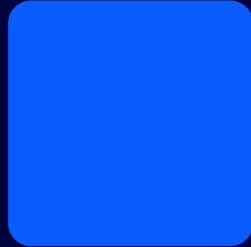
Michelle believes customers are looking for these types of connected experiences: “Almost every brand will leverage AI for CX. The differentiator is *how* you leverage it—whether it’s stitched together in silos, or built into a platform that connects self-service and agents, and centers the business around the customer. That’s what reduces friction. That’s what builds loyalty.”

This isn’t just better for customers; it’s also better for employees. When everyone, from the virtual agent to the people in the back office, can access the same customer information, teams stop chasing details and can focus on solving problems. Conversations get shorter, outcomes get clearer, and brand perception improves with every interaction.

The takeaway: Yes, offer the channels your customers prefer, but design them—with the help of AI and automation—to work together around the moment that matters: Resolution.

Your checklist for outcome-focused CX

- ✓ **Start** from the moment of resolution
- ✓ **Map** back across customer touchpoints
- ✓ **Identify** the data required at each step
- ✓ **Specify** ownership of each handoff
- ✓ **Verify** that all context carries over



Breaking down barriers across the enterprise

You can't expect to deliver a truly connected experience if your organization itself is disconnected. Siloed systems and data repositories result in teams working in isolation, and that's a major impediment to a consistent customer journey. That's when technology becomes a hindrance rather than the vital business enabler it's meant to be.

From an employee's perspective, fragmented systems and teams make it hard for them to do a good job. Agents often have to toggle between multiple apps and databases to piece together information. But the answers are already there, somewhere, waiting to be pieced together, along with the surrounding context. Every one of those app-switching moments or duplicate data entry steps adds friction, slowing resolution times. In other words, when everyone has a siloed view of the customer, no one gets the full picture. And when customers pick up on that disconnection, it erodes confidence.

Breaking down these barriers requires a cultural shift, but culture can only change when the technology underpinning your operations enables it. That shared vision comes with a shared system linking tools and data and, therefore, teams across the entire enterprise. That way, you establish a single source of truth about every customer, where everyone—from billing specialists to field sales reps to support teams and beyond—has access to the same information.

When everyone has a unified view of the customer, it can lead to more consistent and coordinated actions and even reduced risk, since there's less chance of something important falling through the cracks or data getting lost between hand-offs. Zoom's approach is an example of just that: "We built a unified platform for engagement and collaboration that connects to the systems you rely on—CRM, workforce tools, even Microsoft Teams. The result is that your front office, your contact center, and your back office are aligned, instead of siloed," says Michelle.

This connection-first approach also reduces the technology bloat plaguing so many organizations today. That in turn decreases a lot of duplicate effort. Agents don't have to waste time searching for data in several places at once or updating multiple systems just to keep ahead of things. Externally, customers get consistent answers and smooth transitions, because the company is operating as one cohesive unit—not a collection of disconnected departments.

CX isn't just the contact center's job. Every team—even those that are not customer-facing—has a direct or indirect impact, so they all need to work from the same playbook.

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3 steps to a connected operation

Step 1.

Walk the customer path: Pick a common journey like 'billing enquiry' or 'refund request'. Map the steps end-to-end, including where a virtual agent can handle the request and when it should escalate.

Step 2.

Standardize handoffs with AI context: Create a short checklist of items every handoff must include, such as who the customer is, what they're trying to do, what's been tried, current status, and next best step—including an AI summary so the agent gets the full context.

Step 3.

Run a two-week fix-it huddle: Have one person from each team involved meet briefly every day to unblock stalled cases and remove duplicate steps or tools.

How you'll know it's working: Fewer frustrated customers and 'I already told you this' moments, less app-switching, and more cases moving forward without bouncing back and forth.

Going beyond surface-level automation with agentic AI

Technology—especially AI—now plays a huge role in shaping customer experiences with 73% of businesses using AI already generating significant value, according to Metrigy’s State of AI in CX report 2025.³ To be successful in building connection-first CX, AI is a foundational part of connecting the dots across the company. A logical starting point is evolving from a basic bot to an agentic virtual agent that can actually solve the issue for the customer.

Of course, we’ve come a long way from pre-scripted self-service chatbots over the last couple of years. Yet despite the rise of generative AI-powered virtual agents that can respond quickly using conversational language, even they hit a wall when an issue actually requires *doing* something—like changing an order, issuing a refund, or updating account info.

There are two key reasons for this. First, most self-service platforms aren’t deeply integrated into the organization’s processes and back-end systems. For instance, a self-service agent might not have any connection to CRM or billing systems. It might not even have a clear path for escalating tickets requiring human attention. Second, many chatbots still in use today are simple, largely pre-scripted systems with a very narrow scope that can only address the most common queries. For these reasons, among others, only 14% of customer service issues are fully resolved in self-service.⁴

Customers don’t just want faster responses. They want actual solutions. This is where agentic AI comes in, not to replace people, but to coordinate action. Agentic AI systems are autonomous in that they go beyond the reactive responses of current-gen AI chatbots by proactively accessing tools, data, and workflows to actually *resolving* issues—or at least escalating them smoothly in cases where human involvement is necessary or preferred

How to build a virtual agent

Provide effortless self-service with clear, rules-based escalation when needed—without adding complexity:

- Map intents to desired CX outcomes
- Design safe escalations with full context
- Measure, tune, and scale with analytics

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In the context of customer service, an AI agent doesn't just chat with a customer to gather information, but also does something with that information. For instance, instead of having a virtual agent merely saying "I've logged your refund request for someone to process later," an agentic AI system would process the refund there and then—at least if it's properly integrated with the necessary systems and operations.

There's a vast opportunity for companies looking to deploy agentic AI to truly scale their CX operations, with research claiming it will handle 68% of customer service and support interactions by the end of 2028.⁵ As Amy Roberge, Head of Global Contact Center Solutions Engineering at Zoom, says, "When self-service is done well, it doesn't just reduce cost. It actually becomes a loyalty driver. Customers get faster resolutions, agents are freed up to focus on complex cases, and the whole journey feels seamless."



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3 steps to automation that actually resolves:

Step 1.

Define the job: Pick one intent and define the 'done' criteria (inputs, checks, edge cases, and the final action - such as refund issued, plan changed, or appointment booked). This is your blueprint for automation.

Step 2.

Connect the flow: Integrate the data sources your workflow needs to function, such as CRM, billing, or order management systems. Set simple rules for when to act vs. when to escalate, and test with realistic scenarios.

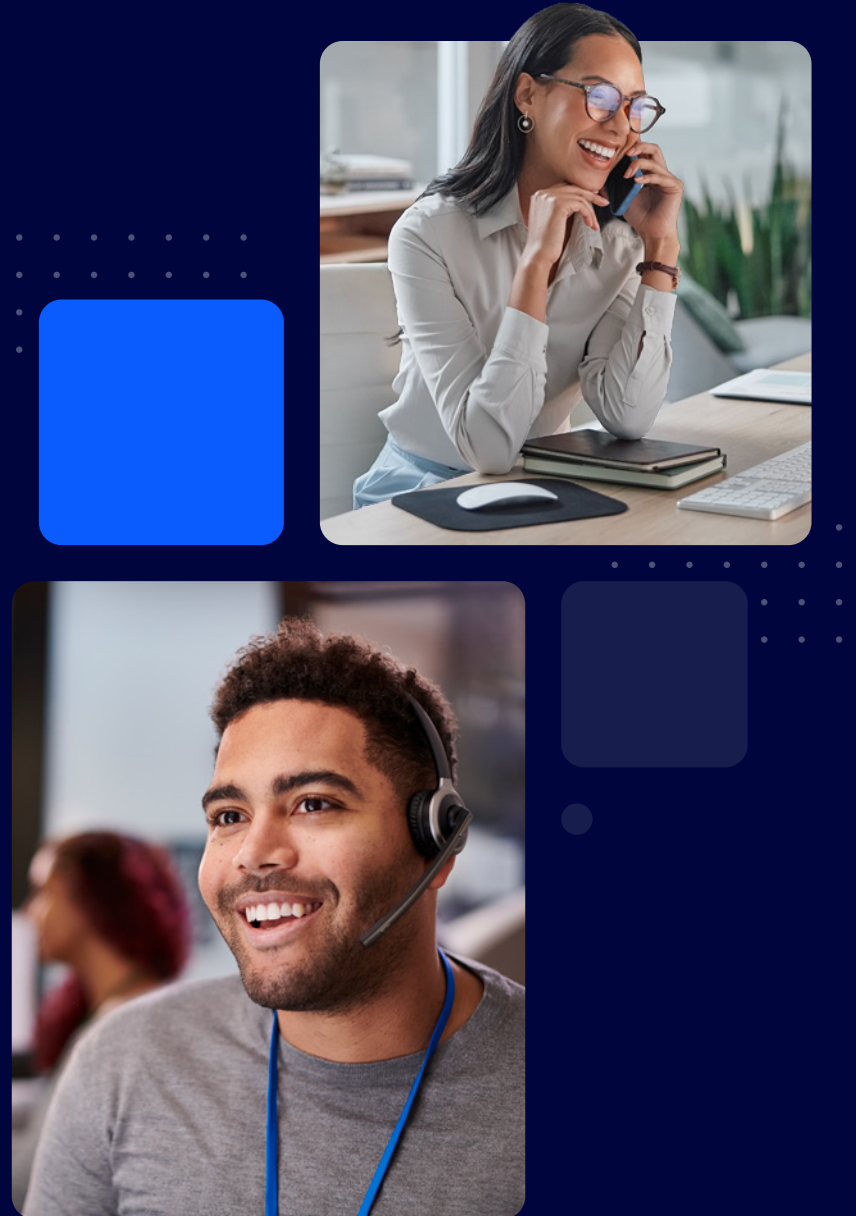
Step 3.

Add a feedback loop: Log completions, near misses, and escalations and review weekly to address high-impact failures before scaling. Use behavioral analytics to spot patterns like drop-offs and fine tune accordingly.

Balancing automation and human empathy

It's important to remember that you can't replace humans entirely. That's not the goal of agentic AI—or at least it shouldn't be. What it does do is add an extra level of automation on top of the reasoning and thinking capabilities of generative AI to the actual *process* of resolving customer queries. Where a basic chatbot might quickly hit its limit and hand off to a support rep, wasting their time with rework in the process, agentic AI can handle tasks, aggregate the facts, and provide the big-picture context to teams when they need it. In other words, it connects systems and processes so that teams can actually do what machines never can—be empathetic.

In the rush to digitize and automate, it's easy to lose sight of this essential fact. Yes, customers *do* typically want to solve routine queries like refund requests or account information updates themselves. But with more complex or emotional issues, customers also want to feel understood and secure in the knowledge that they can speak to a person when needed—specifically someone who has all the facts and isn't going to give them the runaround.



The ‘best of both worlds’ sentiment is this: use AI and automation for speed and convenience, but keep the human touch. Cisco’s research found that 89% of consumers want and expect exactly that.⁵ Ironically, AI can actually help us be more empathetic, not by emulating empathy, but by making sure we have the knowledge we need to do what we do best.

It’s not about AI versus humans but AI working *with and enabling humans*. A generative AI-powered chatbot answers straightforward questions, while agentic AI steps in to automate routine resolutions and link interactions into a single, cohesive picture of the customer. Then, the support team has all the information they need if and when they’re called upon.

As Amy says, “If customers escalate to a human, the experience has to be just as seamless. AI works alongside people in real time. It doesn’t just surface a knowledge article—it reasons through the context of the conversation, pulls relevant policies, and even recommends the next best action. Agents don’t waste time re-asking questions, and customers feel like the agent already understands them.” In other words, the human touch is amplified.

It’s not about AI versus humans but AI working with and enabling humans.

3 steps to a people-first experience

Step 1.

Decide when a human should take over: Make sure you have people available to handle high-risk matters, sensitive topics, complex rules, or upset customers.

Step 2.

Set up your people to succeed: Ensure your agents have all the context they need to solve the issue without having to hunt for information.

Step 3.

Learn from your toughest cases: Use AI to automate interaction analysis, identify patterns in sentiment, and keywords. After difficult interactions, spend five minutes asking what worked, what felt cold, and what should change in your processes.

How you’ll know it’s working: Higher CSAT, customers sound calmer, there are fewer follow-ups about the same issue, and shorter wrap-up notes, since all the context is already there.

Getting started

To deliver a truly connected experience—one that turns interactions into loyalty-building moments—your business needs to evolve from the siloed contact center model to a holistic, connection-first approach that unites people and technology to bring out the strengths in both. After all, we all want to offer better customer outcomes, but that's only possible with a fully integrated enterprise-wide communications and contact center platform with AI at the core that *assists* rather than replaces people.

That means you need to:

- **Recognize that loyalty depends on connected journeys.**
Customers care less about how you help them reach a resolution, so long as it's a fast, efficient, and seamless experience.
- **Break down the siloes because CX is everyone's job.**
A unified platform links your contact center, front office, and back office so that everyone—including teams that don't interact directly with customers—has access to a single source of truth.
- **Leverage agentic AI to respond *and* resolve.**
Forget about basic chatbots, and invest in AI that can coordinate action, resolve routine queries, and equip teams with the knowledge they need to get a complete picture of the customer.

For CX leaders, the call to action is clear: now is the time to act because the quality of customer experiences has become a make-or-break factor for loyalty. It's easily one of the most important brand differentiators. The future belongs to those who achieve enterprise-wide connectivity with shared insights that paint a complete picture of the customer.

Learn how Zoom Contact Center can help your business deliver connected, quality experiences.

[Talk to an expert today](#)



References

1. [What Are Customer Expectations, and How Have They Changed? - Salesforce.com](#)
2. [Forrester Unveils Global Customer Experience Index Rankings, 2025](#)
3. [Metrigy: State of AI in Customer Experience 2025](#)
4. [Gartner Survey Finds Only 14% of Customer Service Issues Are Fully Resolved in Self-Service](#)
5. [How Agentic AI Will Transform Customer Experience | Cisco](#)

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Zoom CX is redefining how organizations connect, engage, and thrive in the AI era. More than a contact center solution, Zoom CX unifies teams, eliminates silos, and creates seamless, AI-first interactions across every channel. Built on Zoom's trusted, scalable infrastructure, it ensures businesses can deliver effortless, connected customer experiences with the reliability and resolutions they expect. Zoom CX enhances efficiency, strengthens customer relationships, and drives long-term growth—all while delivering service that feels easy, efficient, and personal.

[Learn more](#)

