



Automate Agent Interaction Summaries with the Power of AI

Build a Business Case



NICE

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The Benefits of Automated Notetaking

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Automate Agent Notetaking to Save Time and Costs While Improving CX

Many contact centers today look to their agents to provide a detailed accounting of what happens during each interaction. Agents are responsible for accurately and consistently capturing every detail from why the customer contacted the business, what was the outcome of the call, to what actions were taken during the interaction.

Agents using precious time to write a summary of each conversation is time-consuming and can result in significant costs for an organization over time. Additionally, keeping notes that are complete, accurate, and decipherable is a constant battle for any call center, but are an absolute necessity for seamless and engaged follow up service. In one recent NICE study¹, the research revealed that the shorter call times and less dead air that good notetaking promotes can lead to significant satisfaction gains (as much as 3.7x higher CSAT).

The quality of customer support you offer can either sink you or maintain your competitive edge. Seventy four percent of customers would switch to a competitor if they found out they provided a better customer experience.² And the current moment

might be a crucial opportunity to make the most of this market preference since 59% of customers think the quality of customer service has gone down since the pandemic.²

So how can you maintain coherent, customer-centric experiences without the time, money and skills that proper notetaking requires? Luckily, advances in AI are making manual agent summaries a thing of the past. The latest generation of AI contact summary tools automate the notetaking process with great accuracy. The result is smooth and complete interactions with customers and focused, efficient agents. Contact centers are realizing cost and time savings while also setting a foundation for more holistic customer experience improvements.

3.7x HIGHER CSAT

“A recent NICE study found that the shorter call times and less dead air that good notetaking promotes can lead to significant satisfaction gains.”

¹Improve Contact Center Performance with Enlighten

²The 2022 ACA Study: Achieving Customer Amazement



The Benefits of Automated Notetaking



IMPROVE AGENT PRODUCTIVITY

Agents can focus on the customer, not the tedious notetaking.



REDUCE COSTS

Decrease ACW, AHT, and repeat contacts.



BOOST CX

Provide continuity of service regardless of timeline.



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Calculate the Unnecessary Costs of Manual Notetaking

Organizations incur significant costs associated with manual notetaking. If an agent spends roughly 1 minute of time after a call summarizing the conversation with a customer, over thousands or millions of calls per year, the cost to the organization is substantial. One NICE customer calculated that 500 agents taking 75 calls a day cost them over \$11.5M per year of after call work (ACW). (See side bar)

When agents place their customers on hold to write notes, average handle times (AHT) increase. Customers can become frustrated, negatively impacting retention metrics. Alternatively, agents may spend significant time on after call work. This is critical time your agents could be using to focus on taking additional calls or other more value-driven tasks. What's at risk is ultimately your bottom line.

You need your agents to use their time efficiently, but you can't forgo the process of taking accurate notes. If notes are rushed or incomplete, the agent who takes the follow up call from the same customer may have difficulty understanding their support history. They will look to the customer to fill them in on details, which almost a third of customers say is the most frustrating aspect of phone support.³ Having them rehash their story to an agent who lacks the necessary context makes your team seem incompetent and creates a depersonalized customer experience.

Inefficient, inaccurate manual notetaking results in:



Lost time



Higher AHT and ACW



Lower customer satisfaction (CSAT)



High cost of service for the brand



A lost opportunity to deliver better CX and improve the overall customer journey

³ Statista - What is the most frustrating aspect of poor customer experience?

⁴ U.S. Bureau of Labor Statistics and The CustomerServ Blog: Call Center Outsourcing vs. Insourcing Price Comparison

The ROI of Automated Summaries

One customer calculated a total of **\$11.5 million in savings in ACW** for their 500 agents that handle 18,000 calls per year.

Cost of ACW per Agent

 ACW cost per agent per week - \$480

 ACW cost per agent per month - \$1,923

 ACW cost per agent per year - \$23,075

Assumptions

1. Fully loaded agent salary - \$92,300⁴
2. AHT - 4 minutes
3. 75 calls /agent/day x 500 agents= 18,000 calls per year
4. Cost per call - 92,300/18,000=\$5.13
5. AHT - \$5.13/4=\$1.28
6. ACW at 1 minute - \$1.28
7. ACW/agent/week - 75 calls x \$1.28 x 5 days=\$480
8. ACW/agent/month - \$480 x 5 days x 4 weeks=\$1,923
9. ACW cost/per agent/month - \$480x48 weeks=\$23,075



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AI Powered Automated Agent Interaction Summaries

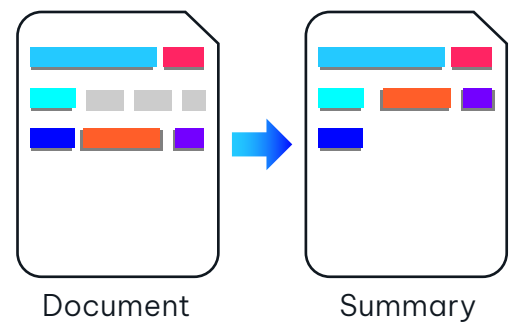
Advances in AI enable new software automations that can radically reengineer processes at every level. A new use of AI automation for the contact center is auto-generated interaction summaries. Tasking AI with note generation off-loads this responsibility from agents, allowing them to focus their time on meaningful conversations with customers.

Enlighten AutoSummary captures all relevant customer contact reasons, actions, and outcomes on 100% of agent interactions to quickly create richer, more complete narratives. The solution achieves high accuracy by using the best of multiple methods of analysis.

These methods include:

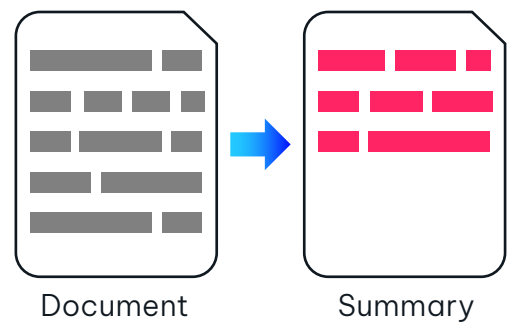
EXTRACTIVE SUMMARIZATION

The most relevant phrases or sentences are used to summarize key events.



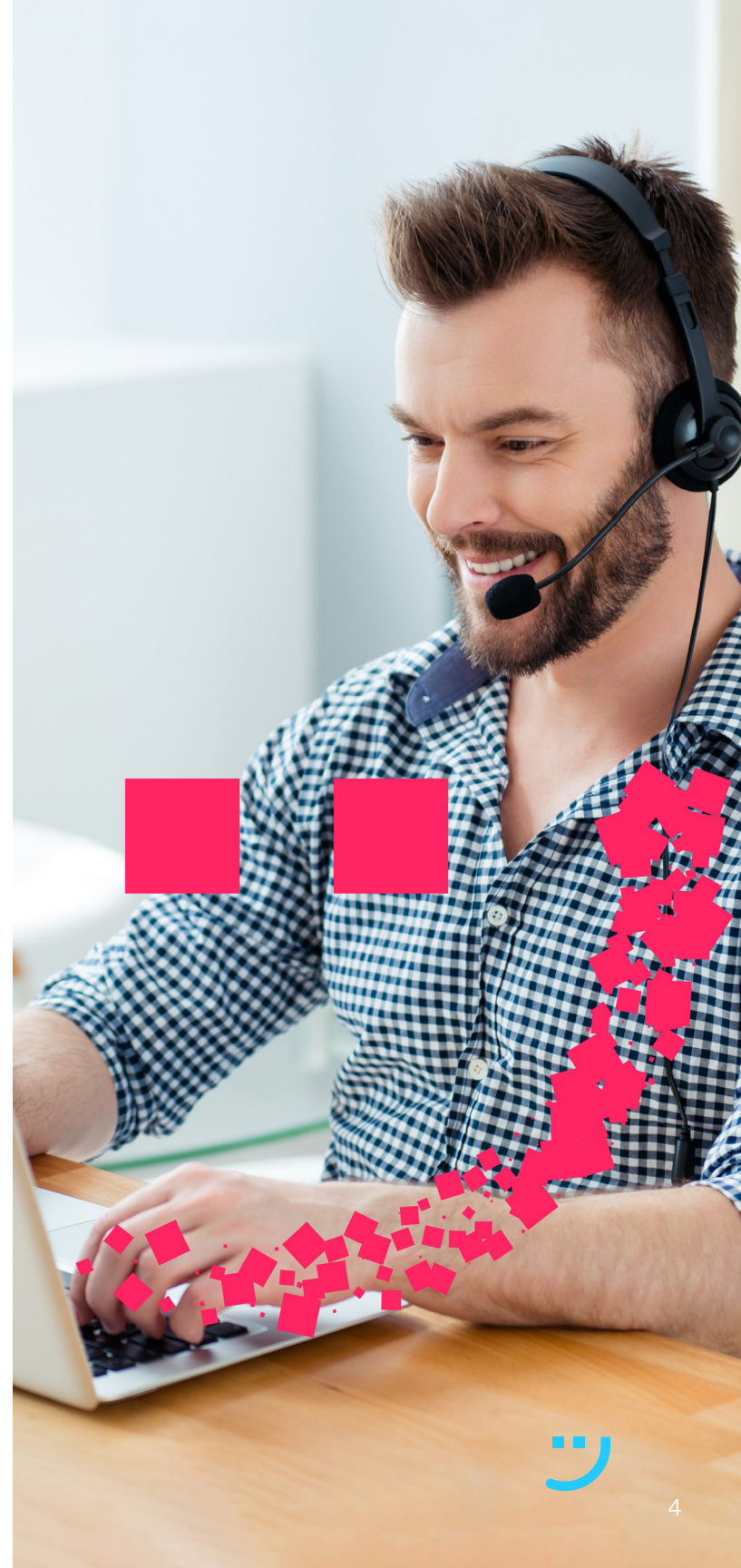
ABSTRACTIVE SUMMARIZATION

Interprets the meaning of the document to make it shorter using AI.



To ensure accuracy and application across many industries, Enlighten AutoSummary's AI models were built from the most extensive interaction dataset on the market. The result is an out-of-box solution that requires no training of models with the customer's own data.

To learn more go to <https://aclianthology.org/W08-1106.pdf>



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Enlighten AutoSummary Outcomes

Examples, below, of AI-informed outcomes that help the next agent understand what happened during the previous interaction:



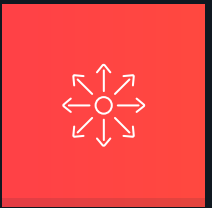
CLAIM SUBMITTED:
a claim was submitted.



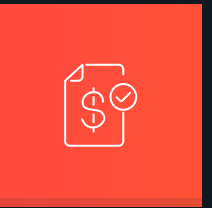
CREDIT/REFUND ISSUED:
a credit or refund was promised.



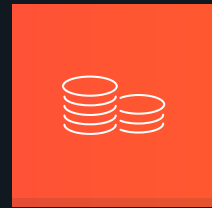
ESCALATION:
the customer requested to be escalated to a supervisor or manager.



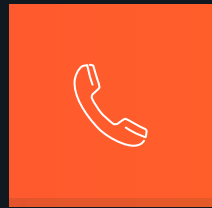
INTENT TO CHURN:
the customer indicated the possibility of churning.



PAYMENT ARRANGEMENT/ EXTENSION:
the customer requested scheduling a payment in the future.



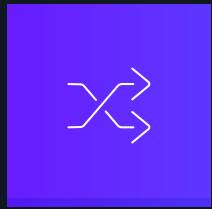
PAYMENT COMPLETED:
a payment was processed.



PROMISED CALLBACK:
the agent promised a callback in the future.



APPOINTMENT SCHEDULED/ RESCHEDULED:
an appointment was scheduled.



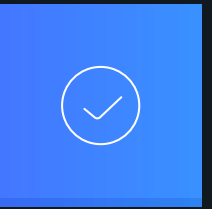
TRANSFERS:
the contact was transferred or deflected.



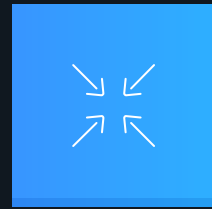
CANCELLATIONS:
the customer discussed a cancellation, for example to an order, an appointment, or a subscription.



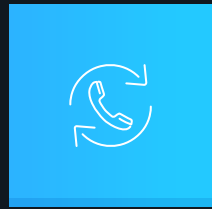
TICKET/CASE CREATED:
the agent has submitted a ticket or case for the customer.



CONFIRMED ORDER:
an order was processed.



RESOLUTION:
the issue was (or was not) resolved.



REPEAT CALLER:
the customer mentioned multiple contacts to resolve an issue.



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Agent Dashboard Display

Enlighten AutoSummary features an agent dashboard to capture data-driven narratives for each interaction and view them in any format, including the ability to:

Track the last customer contact across any channel.

Capture customer contact reason and integrate into the organization's analytics program.

Deliver summarized actions based on key phrases and AI-driven inferences.

Provide agents with easy-to-understand summaries (sentence or bullet formats).

CUSTOMER NAME	James Smith
LAST CONTACT	21 minutes ago
SENTIMENT	NEGATIVE
CONTACT REASON	
👤 SCHEDULING: Missing Payment	✓ ✕
LAST CONTACT	
🎧 UNRESOLVED	NO ✓ ✕
🎧 PROMISED CALLBACK	YES ✓ ✕
CONTACT SUMMARY	
🎧 AGENT AUTHENTICATED USER	✓ ✕
🎧 AGENT RESEARCHED BILL	✓ ✕
🎧 AGENT OFFERED CALLBACK	✓ ✕
NOTES	
Mr. James Smith last contact about Billing: Missing Payment was 21 minutes ago, had negative sentiment, and was not resolved. Mr. Smith was offered and declined a bill credit and was given a promised callback.	

Measure customer satisfaction with AI-based sentiment scoring.

Identify key outcomes from AI-based models.

PROMISED CALLBACK

CONFIRM

✓ ✕

Provide an option for agents to review the notes and make edits. The results are then captured and used to continuously optimize the AI models.



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BEFORE Manual agent note:

“CX James Smith 25854116585858/
concerned about missing pymnt/DM
researched/no record in acc/informed not
posted/ prms cb”



AFTER Enlighten AutoSummary results:

SENTENCE FORMAT EXAMPLE:

Mr. James Smith last contact about **Billing: Missing Payment** was **7 days** ago, had **negative** sentiment, and **was not** resolved. **Mr. Smith** was offered and declined a **bill credit** and was given a **promised callback**.

BULLET FORMAT EXAMPLE:

Text in blue represents structured data

- **Mr. James Smith's** last contact about **Billing: Missing Payment**
- was **7 days** ago
- had **negative** sentiment
- and **was not** resolved.
- **Mr. Smith** was offered and declined a **bill credit**
- Was given a **promised callback**.



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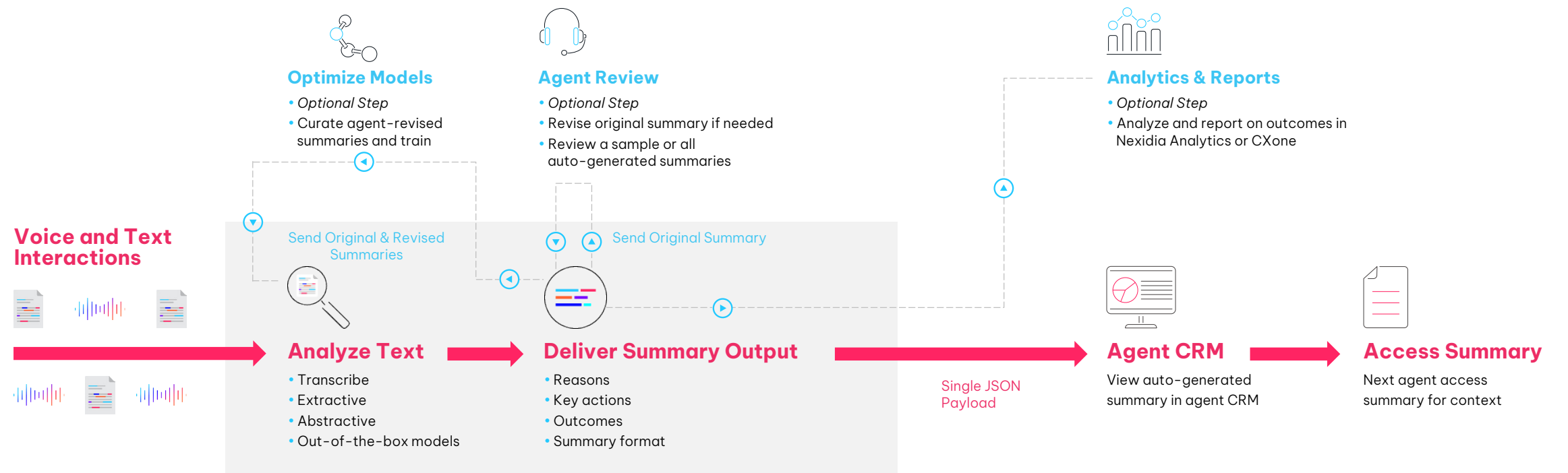
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Enlighten AutoSummary: How It Works

Interactions are analyzed using multiple out-of-the-box methods. Structured automated summaries are then delivered using a standard API to the agent's CRM desktop application right after the interaction. Optional steps include a review and revision (if needed) of all or a sample of the summaries by the agent, the ability to tune the models with the revisions to meet specific needs, and report on summary outcomes using analytics.



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Contact center agents play a critical role in providing exceptional customer experiences. Agents are important, they matter.

Enlighten AutoSummary's purpose-built AI complements the agent role by listening along and then summarizing every interaction.

The full range of customer intents, outcomes, and sentiment are captured accurately – each and every time. Meanwhile, your agent is able to focus on delivering personalized service, establishing rapport and proactively offering additional services or products.

Say goodbye to tedious typing and typos, and hello to savings and smoother CX with Enlighten AutoSummary.

“Enlighten AutoSummary’s ability to accurately summarize what happens during every interaction is exactly what we have been waiting for. The agents also like that it saves them hours of manual typing over the course of a week.”

—DIRECTOR OF CUSTOMER EXPERIENCE,
HEALTHCARE PROVIDER



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Enlighten AutoSummary works with any CRM system so that all notes are easily accessible by any agent using tools they are already trained on. This empowers the next agent to deliver exceptional experiences. By operationalizing objective insights and making them readily available, organizations can:

 **ORCHESTRATE THE PERFECT CUSTOMER JOURNEY:** provide contextual information, including contact reason as well as key outcomes and activities, to the next agent to ensure a seamless journey.

 **PROVIDE READILY AVAILABLE SUMMARIES:** save time by eliminating agent CRM searches for previous summaries from past interactions with readily available notes.

 **DRIVE COMPLETE PERFORMANCE:** use summary data as part of a comprehensive analytics program to ensure that promised actions and outcomes, such as callbacks, have been scheduled.

3 Reasons to Automate Agent Notes:

- **Save on Costs and Time**
Realize substantial cost savings by eliminating manual notes for every agent over time.
- **Deliver Better CX**
Accurate summaries on every interaction provides better data-driven insights to the next agent, resulting in more personalized, seamless CX.
- **Improve Agent Productivity by Reducing ACW**
Less time spent on after call work means agents can handle more call volume.





Say Goodbye to Manual Agent Notes Forever with Enlighten AutoSummary

Learn more at www.nice.com/enlighten-autosummary >

About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud-native customer experience platform, CXone, NICE is a worldwide leader in AI-powered contact center software. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform – and elevate – every customer interaction.

www.nice.com

The NICE logo is located in the bottom right corner of the advertisement. It consists of the word "NICE" in a bold, white, sans-serif font. A blue horizontal line is positioned behind the letters "I" and "C", extending across the width of the logo.