



# The 5 dimensions of AI customer service

The discourse surrounding generative AI spans a wide range of perspectives. On one hand, it's hailed as the ultimate solution; on the other, it's criticized for its susceptibility to hallucinations and unreliability. The paradox? Both are true.

If you're wondering whether or not to hire an AI Agent for customer service, this... isn't helpful. But waiting to adopt generative AI in customer service isn't an option—it's a ticking clock. The risk? Falling behind, fast.

Here's the truth: generative AI is only as good as the application it's powering, and AI Agents are only as good as the success strategies around them. You're actually closer to being AI-ready than you think. The key lies in understanding where your current function stands and knowing what's needed to launch a thriving AI Agent and maximize its success. That's where the AI Customer Experience (ACX) program comes in.

We've partnered with hundreds of customer service leaders to develop the key dimensions that make up ACX. The program is more than just a strategy; it's a blueprint to help you assess your current customer service capabilities, identify gaps, and target areas for improvement. Once you're ready to promote your AI Agent, it becomes your roadmap to leap ahead of the competition—unlocking efficiency, quality, and superior customer experiences.

## In this guide...

We'll introduce the 5 dimensions of an ACX program and give you recommendations to advance in each one—so you're not just keeping up, but leading the charge:

1. Team structure
2. Knowledge management
3. Integrations and systems
4. Company engagement
5. Scale and coverage

# Anchoring in Automated Resolutions

While there are several KPIs that factor into the maturity of each dimension, the success of the program is anchored in one North Star: Automated Resolutions.

Let's take a step back and think, "What's the purpose of an AI Agent in customer service? What is the one job it should do well that would lead to all the benefits I care about?" The answer is to **automatically resolve customer inquiries**.

AI Agents are only as good as the number of inquiries they can resolve.

Legacy customer service metrics fall short in the era of generative AI—for example, containment rates can tell you what percentage of conversations with the bot ended without being handed off to a human agent. But without context, can you differentiate between a customer who ended a conversation because they were satisfied and one who simply got frustrated and gave up?

Containment doesn't tell the whole story... we weren't able to understand if all users were getting guaranteed resolutions, or if they dropped off at some point within the experience.

We use Automated Resolution rate as a core KPI for our digital support team, and we are reporting it up to our senior leadership because of the efficiencies that we are driving throughout the business."


Allie Hurley,  
Head of Global Support



AI Agents are capable of true resolution and that's what we should be holding them accountable to, especially considering that Automated Resolution (AR) has a direct impact on your bottom line. We've seen this time and time again—as the AR rate increases, so does efficiency and CSAT.


By anchoring the program in AR, you'll be able to confidently assess which ACX investments are worthwhile and which ones should be deprioritized.

## Higher efficiency



**75%** increase in AR rate  
*results in a*  
**75%** reduction in OpEx

## Better experience



**10%** increase in AR rate  
*results in a*  
**5%** increase in CSAT



### Related reading

- [Guide to Automated Resolutions](#)
- [13 questions to ask before paying for Automated Resolutions](#)

# 1. Team structure

Much like any tool, AI can't do anything on its own. The same knife can cut a tomato or turn it into a rose, it all depends on the chef that wields it. To have a world class ACX program, you need to build a world class team of individuals to shepherd it.

	Most companies are here	Early adopters are here	What world class looks like
Team roles	All members are required to handle multiple roles within the program. There's virtually no clarity on who's accountable for which responsibilities.	Team members have clearly defined roles, and regularly collaborate with other functions within the organization to fulfill the responsibilities of any missing FTE roles.	The ACX team includes a senior manager (such as Director or VP), an AI Manager, and any necessary FTE technical resources (such as Integrations Engineer, AI Analyst, or AI Knowledge Curator).
Task division	Team members take on tasks as capacity allows. As a result, tasks aren't well-organized or prioritized, and there's more focus on the day-to-day instead of long-term growth planning.	Team members have clearly defined responsibilities, but unexpected requests are handled on an ad-hoc basis.	ACX is no longer considered a tiger team, but a strategic division. Responsibilities are clearly defined and there are processes in place for unexpected tasks.
Career paths	Career paths for AI Managers are the same as those set for human customer service agents, with no clear growth trajectory.	There's a loose hierarchy and team structure, but no clearly defined career paths.	Team structure and career progression paths for team members are clearly defined.
Technical support	When technical support is needed to upgrade the AI Agent, it requires significant business justification, and not always provided in a timely manner.	Technical support requests from the ACX team have a higher priority, and are managed in a timely manner.	There is a full time engineer dedicated specifically to the AI Agent.

## How to level up team structure



### Executives

The scale of digital transformation involved in the era of generative AI is unprecedented. More than just a software update, hiring AI Agents in customer service requires a mindset shift centered around AI management which may include restructuring teams of hundreds at larger enterprises. This McKinsey study reports that most companies are unprepared for the implications to people and processes that AI Agents bring.

This is where you come in. You play a pivotal role by facilitating the change management process within the customer service organization and the company at large, such as greasing the wheels for closer collaboration between customer operations, legal and compliance, product and IT teams.



### Customer service leaders

- 1. Team structure:** Having a clearly defined team structure lends more legitimacy and authority to the ACX program while ensuring that you have enough staff on board to get the best results for the business. Depending on company size and organization, determine the best team structure for the ACX team. Based on that, see who you need to hire in the short term and later down the line as the program grows.
- 2. Task division:** As you're laying out the different stages of growth for team structure, make sure you're also clearly defining who's doing what. This improves the efficiency of the individual team members and offers clarity to the rest of the organization.
- 3. Career paths:** To get the best out of high-performing individuals, you need to show them how they can grow. Otherwise, you run the risk of them feeling stagnant or unfulfilled. Creating career paths not only ensures that your highest performing members can keep growing, it also helps you plan how the team structure will grow as you mature in this dimension.



**Related reading:** [How to build a world-class AI customer service team](#)




## 2. Knowledge management

Support content is usually written for customers, but ever since conversational chatbots became popular, no one really wants to read it anymore. And it makes perfect sense; what do you think is easier, searching through articles in the help center or simply asking someone who knows?

That doesn't mean support content is useless now, on the contrary, it's the ultimate source of truth for your AI Agent. Any answers it generates have to be grounded in your content to ensure they're accurate, relevant, and safe. Optimizing the knowledge base (KB) for generative AI will help you maximize your AI Agent's effectiveness.

	Most companies are here	Early adopters are here	What world class looks like
KB AI readiness	There's a KB for the AI Agent to pull content from, but it doesn't follow AI best practices. This could create instances of confusion when the AI Agent is trying to find the right answer for a customer question.	The KB owner reviews the AI Agent's performance to uncover content optimization opportunities.	The entire KB is structured according to AI best practices, ensuring it is easily understood by the AI Agent.
KB maintenance	The KB gets updated reactively.	The KB is regularly updated and contains nearly all the information the AI Agent needs.	There are FTEs fully dedicated to owning, proactively updating, and maintaining the KB.

 **Related reading:** [Knowledge base best practices for generative AI](#)

# How to level up knowledge management



## Executives

Support content is the source from which the AI Agent pulls information to generate answers and resolve inquiries. It's the well that waters the interactions customers have with your company. While before it used to be a necessary customer support requirement, it's now effectively an extension of your brand.

As an executive, your role revolves around championing the importance of support content in two main ways:

1. **Investing in the work required for data readiness and cleanliness**, which typically refers to the availability of reliable source information to train a generative AI tool on. Unsurprisingly, many large enterprises have fragmented, inconsistent or incomplete sources of information, which can make deploying an AI Agent at scale challenging.
2. **Elevating the value of support content** by holding it to the same level of scrutiny and strategic importance as other external-facing content, such as the website, blog, social channels, etc. This includes ensuring you have the right team members in the right roles and aligning on their goals and KPIs.



## Customer service leaders

1. **Optimization:** This may seem like a “make work” step, but we can't overstate how much KB optimization influences your Automated Resolution rate. AI Agents have a much easier time reading and reasoning using a well-optimized KB, which increases the number of questions they can answer and reduces the risk of confusion or hallucinations.
2. **Maintenance:** Establish a regular cadence for updating content to transition from a reactive to a proactive approach. Review unresolved conversation topics as well as analytics and AI feedback to identify and address knowledge gaps.
3. **Ownership:** Ensure your program has the capability, either directly or through a partnership with another team, to make ad hoc updates and optimizations to your knowledge bases. You want to be able to make updates almost instantaneously, without much friction.

### 3. Integrations and systems

Think about all the software that your human agents need to access in order to do their jobs. Equipping them with support content can help them answer customer questions, but what about the systems that allow them to understand a customer's history with your company, look up transactions that they'd made, or take actions on their behalf?

The concept is exactly the same for AI Agents. Integrating the AI Agent to relevant business systems expands its impact across more complex or action driven use-cases. More integrations = more Automated Resolutions = more of the wins you care about.

	Most companies are here	Early adopters are here	What world class looks like
Depth of integrations	The AI Agent communicates with 1-2 systems but can only retrieve information, not edit it, limiting its ability to take action on behalf of the customer.	The AI Agent is integrated with the most critical systems in your tech stack, and is capable of both retrieving and editing customer information.	The AI Agent is deeply embedded within the company's systems. The ACX team has a full time technical resource on board to build or adjust internal APIs that enhance your AI Agent's capabilities.
AI Agent abilities	The AI Agent considers basic visitor data such as language and initial URL to provide basic personalization.	The AI Agent authenticates individual users and can take action based on personal data (e.g., account balance, order status).	The AI Agent can handle nearly all use cases.

## How to level up integrations and systems



### Executives

As an executive, you have to tightly align the ACX program to quarterly and annual business objectives. Not only does this ensure that the success of the program ladders up to the success of the company, it also highlights which AI Agent improvements are necessary to help you achieve your goals.

Investing in these improvements should hold the same weight as an item on your product roadmap. Through this alignment, you can secure the support you need from necessary functions within the company, whether that's connecting AI Agent with systems that the customer service team doesn't own, or ensuring that technical teams prioritize ACX requests.



### Customer service leaders

- 1. Depth of integrations:** As you're identifying the systems you want to integrate the AI Agent with, work with technical support to confirm that it can access the data via APIs. Most AI Agents have an array of out-of-the-box integrations with popular customer service software which are virtually no code. If there isn't one for a specific system in your tech stack, you can create the business case for technical support to set up the integration.
- 2. AI Agent abilities:** Determine what systems your AI Agent needs access to in order to automate more resolutions; if you already have an AI Agent, the unresolved conversations are a great place to look. Prioritize these by highest impact on your Automated Resolution Rate, then start integrating your AI Agent to the relevant systems.

## 4. Company engagement

Company engagement is how the customer service team can have a direct impact on the bottom line. By sharing the learnings and impact of the AI Agent (and ACX program) with the wider organization, the team can have a positive influence on core business decisions such as product roadmap or strategic partnerships.

	Most companies are here	Early adopters are here	What world class looks like
Customer service dashboards	The team uses basic out-of-the-box dashboards that track traditional metrics like containment and CSAT.	The team utilizes the AI Agent's data export capabilities to build custom dashboards that track advanced metrics like AR, Cost per Contact, and detailed ROI.	The team uses additional AI Agent capabilities and APIs to create dashboards tailored to the specific success goals of the ACX program. The dashboards also correctly attribute revenue generated by the ACX program.
ROI analysis	The ROI of the program is roughly estimated during Quarterly Business Reviews.	The team regularly shares updates on how the ACX program is tracking against ROI goals and presents a detailed ROI analysis during Quarterly Business Reviews with key stakeholders.	In addition to the column on the left, the ACX program ROI analysis also accounts for revenue generation use cases executed by the AI Agent.
ACX program evangelism	The reports and successes of the ACX program are shared beyond the core team but mostly within the customer service department.	The ACX program is promoted at ad hoc opportunities outside of the customer service department, such as town halls or big win highlights.	The ACX program is regularly promoted, championed, and celebrated across the entire company, as well as celebrated externally at ad hoc opportunities, positively influencing the brand image.

## How to level up company engagement



### Executives

It's imperative that you adequately evangelize the ACX program, especially in executive and board meetings.

Evangelizing the ACX program is more than just celebrating success (even though that's important on its own). By promoting the work that the team is doing and showcasing how the success of the program is contributing to the company's growth, you'll have an easier time securing investment budgets and getting higher priority when requesting resources from other teams.

Increasing visibility for the ACX program also elevates the role of the customer service team. They can be positioned as champions for the voice of the customer and, as such, be held accountable to business decisions.



### Customer service leaders

- 1. Customer service dashboards:** The more data you have access to, the better you'll be able to accurately measure success. Determine what the key metrics are important to you and ensure your dashboards are set up to track them.
- 2. ROI analysis:** Similarly, the more data you have access to, the more robust and accurate your ROI analysis will be. Showcase how a positive improvement in the key metrics you identified correlates to a positive increase in ROI. If you're at a level where the AI Agent is powering revenue generating use cases, make sure you have a way to accurately attribute revenue to the ACX program and include it in the analysis.



**Related reading:** [Key AI customer service metrics leaders need to be tracking](#)




## 5. Scale and coverage

To get the most ROI out of your ACX program, you want to make sure that the AI Agent is the first point of contact on as many channels as possible (scale), automatically resolving as many use cases as possible (coverage).

This also creates a better experience for your customers, as they would benefit from a digital brand concierge who greets them consistently no matter which door they walk in from and guides them toward the support they need. In instances where a human agent is needed, the AI Agent can gather any necessary information upfront before facilitating a handoff, making the rest of the interaction as smooth and as quick as possible.

	Most companies are here	Early adopters are here	What world class looks like
Scale	The AI Agent is the first point of contact on less than 30% of customer interactions. The AI Agent is only servicing one channel.	The AI Agent is the first point of contact on 30% - 60% of customer interactions across more than one channel.	The AI Agent is the first point of contact on over 60% of customer interactions across all support channels, including chat, social messaging, email.
Coverage	The AI Agent is able to automatically resolve up to 30% of conversations.	The AI Agent is able to automatically resolve 30% - 60% of conversations.	The AI Agent is able to automatically resolve more than 60% of conversations.

 **Related reading:** [Guide to finding the right AI Agent for omnichannel customer service](#)

## How to level up scale and coverage



### Executives

It can be difficult to build adequate trust in the reliability of generative AI systems, especially in light of the rise in AI skepticism. This can hinder the program's success (and your success as a result). Through evangelizing the ACX program, you'll be building trust in the AI Agent so the rest of the business feels comfortable putting it in front of as many customers as possible.

Another avenue for you to consider is business process outsourcing. If you typically outsource all or part of your customer service, consider integrating an AI Agent where you'd typically rely on external support. Alternatively, you could have an AI Agent manage 50% of the volume you'd normally outsource, allowing you to A/B test cost, quality, and resolution rates. If the AI Agent proves to deliver equal or better performance than your BPO partner, the decision to transition becomes a no-brainer—improving efficiency while cutting costs.



### Customer service leaders

- 1. Scale:** The more channels you delegate to your AI Agent, the more conversation volume it can automatically resolve, and the bigger your ROI gets. Identify where customers are most likely to reach out for support and ensure that the AI Agent is accessible in these areas, prioritizing the channels with the highest volume. Hiring an AI Agent with omnichannel capabilities will allow you to position it as the first point of contact no matter which channel your customers reach out on, even email and phone.
- 2. Coverage:** Coverage refers to the breadth of use cases that the AI Agent can automate, which directly influences your Automated Resolution rate. Increasing coverage mainly requires leveling up in these two dimensions:
  - a. Knowledge management:** Ensuring that the KB is optimized for the AI Agent and is regularly updated with content to enable it to handle a wider range of topics.
  - b. Integrations and systems:** Ensuring it has access to the software it needs to provide personalized responses and take action on behalf of the customers.

## The relationship between ACX maturity and business growth

The beauty of the ACX program is that the value of the whole is bigger than the sum of its parts. While each dimension contributes to improving efficiency and the customer experience, all of them working together help you establish an unparalleled competitive advantage. By maturing the ACX program, you'll not only be able to sustain that advantage, but exponentially increase the ways in which you benefit from it.

As you've probably noticed, there are quite a few dependencies and domino-effects between the 5 dimensions. Having a methodical approach to assessing and improving each dimension can help you plan where and when to invest resources. Bonus: it ensures you're maximizing the efficacy of each dimension through all the stages of its maturity.

Ok, let's take a beat. At this point you might be feeling a little overwhelmed. It seems like there's so much to do, perhaps you don't know where to start, or how. Forgive this cliché, but the old adage holds true, "a thousand mile journey begins with a single step." The most crucial step is to get started.

So here's your next step:

- **If you don't have an AI Agent yet**, find one that works for your business needs and hire it.
- **If you do have an AI Agent**, work with your partner platform to assess the maturity of your ACX program on each of the dimensions to establish a starting point.

You'll see how quickly things come together after that.

### Related reading:

- [Guide to interviewing AI Agents](#)
- [Critical capabilities for evaluating your AI Agent](#)

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