1. **How can I engage younger generations in feedback (solicited and unsolicited)?**
   - Solicited feedback can be very challenging as survey fatigue sets in. Younger generations do not always respond well to surveys, texts, or emails, so shifting to interaction-based signals becomes essential.
   - Capturing 100% of the interactions and segmenting feedback based on population to infer sentiment and needs allows for large-scale unsolicited feedback. For real-time solicited input, meet them where they are: **social posts, in-app prompts, and micro-engagement moments** instead of long surveys.

2. **How can I distinguish transactional versus complex problem-solving use cases?**
   - When expanding automation or AI capabilities and determining the best interactions to target, the most logical starting point is low-effort, high-volume transactions. Focusing on these areas can drive the greatest impact on customer effort, resolution rate, call length, and NPS while delivering meaningful improvements to overall CSAT.
   - Our Insights iQ™ "Automation Finder" concept does exactly this. It helps you identify the more transactional intents that can be evaluated for automation. From there, you can use AnalystGPT to create process flows that feed into the AI Agent configurations process. Insights iQ helps segment which interactions thrive with AI versus which require human empathy, advice, or judgment.
   - Place people where they deliver maximum relationship value while AI handles effortless tasks that customers prefer to self-manage.

3. **How do I leverage AI tools to promote customer self-service beyond "simple" chatbots?**
   - Self-service succeeds when AI makes the experience **faster, clearer, and more proactive** than human alternatives.
   - Transparency builds trust: When AI resolves an issue, let customers know.
   - Insights iQ identifies interactions with high self-service propensity, quantifies impact, and reveals knowledge base/policy gaps that must be fixed for self-service to thrive.

4. **How do I find the top three drivers behind the rising call repeat rates, and can you propose the quickest fix?**
   - This is exactly what Insights iQ and AnalystGPT do for you. Not only will they identify the top three drivers, but they also quantify the frequency and overall impact to the business and then provide recommendations on how to improve in near real time.
   - One query can surface the top drivers and provide summaries that guide upstream fixes.
   - By leveraging the intent, AnalystGPT can recommend improvements and forecast the impact of each recommendation.

5. **How do I find where the largest friction among customers contacting me is?**
   - Look at call types for call patterns and interaction intents that are causing the highest customer effort score. Then, drill into root cause and allow AnalystGPT to present recommendations.
   - By evaluating every interaction, Insights iQ pinpoints friction hot spots: long handle paths, confusing policies, broken digital journeys, or unclear messaging.
   - This allows teams to quickly see where customer effort spikes and why.

6. **How can I alert stakeholders to urgent trending issues before reports arrive?**
   - Traditional methods of identifying these issues involve surveys, QA, or system reporting before analytics, root cause, and remediation can be established. AnalystGPT changes this by **providing near-real-time visibility** into issues and trends; it can even predict future results. By sharing this information beyond a data science team and into the stakeholders, you shift from reactive to proactive.

- The most effective approach is **streaming interaction data** throughout the day, enabling AI to detect anomalies as they emerge.
- Insights iQ and AnalystGPT can surface urgent issues, sentiment shifts, or volume spikes long before a human reviews a report.
- This transforms monitoring from reactive reporting to **proactive early-warning intelligence**.

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7. **How can I automate the CX referral process?**
   - Predictive NPS (pNPS) scoring identifies customers who are most likely to be strong advocates in the market to buy and/or who are in the market shopping for solutions.
   - Marketing teams can then deliver targeted messaging or offers to this high-propensity segment, maximizing referral lift.

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8. **A key business challenge for an analytics team is accurately predicting customer lifetime value (CLV). This involves building a robust model that can identify which customers will be most valuable over time, enabling the company to optimize marketing spend and improve customer retention and loyalty.**
   - Interaction-level intelligence offers a rich signal for understanding what behaviors and experiences drive long-term value. CRM level data can also be integrated into Insights iQ.
   - Insights iQ uses historical patterns and ongoing behavior to identify CLV drivers and detractors.
   - This empowers organizations to act early, adjusting experience, retention strategies, and investment by customer segment. Ongoing measurement allows you to track the improvement generated in CLV based on each recommendation and the actions taken.

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9. **How do I implement QA automation + deep analysis + knowledge base AI?**
   - Automated QA becomes scalable when AI evaluates **100% of interactions** against your criteria, identifying compliance gaps and coaching opportunities.
   - Insights iQ flags interactions requiring human review and reveals trends tied to system or process issues.
   - For knowledge bases, AI highlights articles that fail to resolve issues efficiently and provides recommendations for continuous knowledge base improvement.

- Every agent has a different set of strengths and weaknesses. Leveraging our Insights iQ platform allows individual needs-based training and upskilling instead of wasting cycles where acumen has been demonstrated.

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10. How do I retain human connection authentically while scaling with AI?
- Transparency is foundational: Customers value knowing when they are speaking with AI or a person.
- Insights iQ helps segment which interactions thrive with AI versus which require human empathy, advice, or judgment.
- Place people where they deliver maximum relationship value while AI handles effortless tasks that customers prefer to self-manage.

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11. How can I handle challenges securing long-term contract renewals?
- Understanding what consistently leads customers to say "Yes" requires analyzing patterns across customer segments, not relying on a single narrative.
- Insights iQ segments the customer types and uncovers the behaviors, moments, and outcomes most predictive of renewal for different customer types.
- Combined with strong operational execution, this allows organizations to tailor retention strategies that resonate with each segment.

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12. How can I implement real-time reporting on KPIs?
- KPI timeliness depends on how frequently interaction data can be fed into the system by clients.
- Insights iQ processes this data in **near real time**, enabling rapid visibility into trends, performance, and experience drivers.

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13. How can I predict and prevent high-risk service issues?
- Your description mirrors the core value of interaction intelligence: analyzing sentiment, patterns, and behaviors to identify early signs of risk.
- Predictive scoring highlights where customer friction, product issues, fraud, or churn signals are emerging.

- Insights iQ surfaces risks early and can plug into operational workflows or automated actions that prevent escalation as quickly as you can provide interaction data for analysis.

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14. How do I create a tool that ensures a knowledge base is "clean" before implementing agentic AI?
- For knowledge bases, AI highlights articles that fail to resolve issues efficiently and provides recommendations for continuous knowledge base improvement.

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15. How can I obtain better hourly and daily projections to minimize abandon rate?
- Forecast accuracy improves when insights incorporate **interaction patterns, intent trends, and seasonality** rather than historical volumes alone.
- Insights iQ can highlight drivers of unexpected spikes and help recalibrate staffing models more dynamically.
- When combined with your WFM process, it can provide better insights for better planning.

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16. How can I implement predictive customer behavior?
- Predictive models trained on interaction patterns can anticipate customer needs, risks, and next actions with high accuracy.
- Insights iQ uses these signals to forecast satisfaction, churn likelihood, intent shifts, and service needs to enable proactive engagement.

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17. How can I sort and prioritize emails intelligently in one hour?
- Email can be treated like any other interaction: analyzed for sentiment, urgency, topic, and customer profile.
- Insights iQ models can score each incoming email, classify it, and push routing or prioritization rules into your CRM or queueing system.

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18. How can I obtain quicker data insights using near-real-time intelligence + predictive scoring?

- Insights iQ combines interaction analytics, predictive models, and tailored prompts to deliver rapid, actionable insights as quickly as you're able to provide the interaction data.
- This provides not just what happened but why and which action will have the greatest impact on CX, revenue, or efficiency.
- Insights iQ processes this data in near real time, enabling rapid visibility into trends, performance, and experience drivers.

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19. What are some best practices as it relates to pairing up knowledge base management and AI solution engines or applications?

- Treat knowledge as a product. Manage knowledge with ownership, freshness expectations, and quality standards, just like any enterprise system.
- Separate content ownership from AI consumption. Keep documents in their systems of record (SharePoint, Confluence, etc.) and use the AI knowledge layer only for indexing, retrieval, and access control, not as the source of truth.
- Context, metadata, and security matter more than the model. Strong tagging (client, program, date, policy type) and enforced access controls are critical to ensuring the AI gives the *right* answer to the *right* person.
- AI must be grounded and cite its sources.
- Close the loop to continuously improve knowledge.

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20. Is there a shift from siloed PoCs to AI mesh with agentic orchestration?

- Yes, enterprises are moving toward connected, cross-functional AI frameworks that orchestrate tasks across business units.
- Industries with high customer interaction complexity — **financial services, telecom, retail, and healthcare** — are leading this shift.
- Organizations want AI that works across journeys, not isolated tasks, which is where platforms like Insights iQ align well.

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21. How do we ensure using AI doesn't signal "We've stopped caring"?

- Customers feel cared for when AI is **transparent, reliable, backed by seamless human support, and delivers the outcome they expect**.
- Table-stakes functionality includes clear escalation paths, empathetic tone models, and real-time awareness of customer context.

- Brands may tune this differently, but consistency + transparency = trust across demographics.

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22. "You should call the webcast 'BI, not BS.'"
- Noted. Our goal is to keep insights grounded in real operational impact, not hype.

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23. Are we entering an "outsourced-first" phase of AI adoption?
- Many enterprises prefer BPO partners to lead early AI adoption because they bring **scale, operational readiness, and risk management**.
- Buyers increasingly expect BPOs to deliver agent assist, predictive intelligence, and AI-driven automation as part of their value proposition.
- This outsourced-first model accelerates adoption and de-risks internal investment.

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24. It's recommended to clean our knowledge base before going agentic. Why not build a tool?
- Completely agree that a clean knowledge base is foundational, and maintaining it is a challenge for every CX org.
- iQor currently has the process, when combined with Insights iQ, to automate knowledge base validation, detect outdated content, and streamline governance.

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25. Is there a risk of being "too curious" when analyzing insights?
- Curiosity is powerful, but insights must be filtered through **impact and relevance**.
- That's why we use frameworks to focus on the signals that meaningfully move enterprise metrics.
- Curiosity guided by measurable impact ensures teams move quickly without chasing noise.

```mermaid
flowchart TD

Customer Calls for Second
Opinion
762 calls - 100%

Initial Assessment &
Verification

Account Verification
Success
~650 calls - 85.3%

Information &
Documentation Gathering

Complete Documentation
Available
~520 calls - 68.2%

Eligibility Assessment

Eligible for Second Opinion
~312 calls - 40.9%

Not Eligible - Coverage
Issues
~156 calls - 20.5%

Requires Further Review
~52 calls - 6.8%

Incomplete/Missing
Documentation
~130 calls - 17.1%

Account Verification Issues
~112 calls - 14.7%

Fee Assessment &
Authorization

Explain Coverage
Limitations
Resolution Rate: 15.4%

Transfer to Claims
Specialist
Resolution Rate: 11.5%

Request Additional Info
~90 calls - 11.8%

Transfer to Specialist
~40 calls - 5.2%

Transfer to Escalation
Resolution Rate: 0.9%

Service Fee Required
~125 calls - 16.4%

Fee Waiver Requested
~62 calls - 8.1%

UNRESOLVED - Coverage
Issues
156 calls - 20.5%

UNRESOLVED - Requires
Escalation
171 calls - 22.4%

Customer Accepts Fee

Fee Waiver Decision

No Fee Required
~125 calls - 16.4%

Fee Accepted
~87 calls - 11.4%

Fee Declined
~38 calls - 5.0%

Waiver Approved
~31 calls - 4.1%

Waiver Denied
~31 calls - 4.1%

Proceed to Scheduling
~125 calls

UNRESOLVED - Fee Declined
38 calls - 5.0%

Scheduling Process

Successfully Scheduled
~154 calls - 20.2%

Scheduling Issues
~89 calls - 11.7%

RESOLVED
154 calls - 20.2%

Vendor Availability Issues
~45 calls - 5.9%

Customer Scheduling
Conflicts
~25 calls - 3.3%

System/Technical Issues
~19 calls - 2.5%

UNRESOLVED - Scheduling
Issues
89 calls - 11.7%
```