



# Customer Care AI: Transformation Service with Intelligent Automation

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**Jeanne Grunert:** Hello, and welcome to our webinar today, "Innovate and Scale with CCAI: GenAI Solutions for Superior Customer Experience." We're so glad you could join us today.

This webinar is brought to you by rSTAR Technologies, a leading system integrator specializing in IT modernization, data and integration, customer experience, cybersecurity, and AI for asset-intensive industries. For more information, **visit www.rSTARtech.com**.

Today's webinar will include time for questions, and if you'd like to ask a question, please tap the QA button at the bottom of your screen. You can type it into the pop-up box and our moderators and presenters will answer them at the end of the session.

Now, without further ado, I'd like to turn this conversation over to our first presenter. Chris, take it away.

**Chris Moyer:** Hey, thanks, Jeanne. Good afternoon, everybody. Good evening, good morning, depending on where you're joining from. That's the beauty of virtual, we can be anywhere. I'm an advisory member for the rSTAR team, so spent a lot of time with the team on strategy, direction, portfolio offerings.

My background, pretty much in the integration and technology domain for 40 years. The last five years, really at Exelon, being their chief technology officer and driving our strategy and our separation from Exelon and Constellation. And then 35 years prior in IT services, working around the globe with customers in lots of industries, and have probably spent countless days on strategy and countless months on transformation and implementation. Really excited to join you today and looking forward to our conversation. Jason.

**Jason Wisdom:** Thank you, Chris. Hi, everybody. My name is Jason Wisdom, and I'm currently rSTAR's Head of Artificial Intelligence. I've worked with AI professionally since 2012, just to give you some of my background through different terms that it was known then, such as data science, natural language processing, machine learning, deep learning, conversational AI, feature engineering, neural networks.

Now, today it's called RAG, Large Language Models, Transformers, and AI agents. There's a lot of terms. And yes, today there are newer technologies. There's a whole new level of training data that wasn't available before, and AI capabilities are much more integrated than they used to be. On the other hand, AI has really not changed all that much. Today, I'll talk about why that is and what you can do and what should do for successful AI implementations at your company. More on that later, but for now, back to you, Chris.

**Chris Moyer:** Hey, thanks for that. And I look forward to this, Jason. If we kind of look at where AI is at on the next slide, you'll see, kind of let's talk about it from what's the C-suite think. These stats come out of several studies from different systems integrators and industry analysts. But the bottom line is all of your CEOs, CFOs, they're reading different stories, they're seeing different snippets, and it's driving a very nervous, but anxious and positive in many cases, way of looking at, hey, how do I harness AI for my business? And today we're going to talk about one specific approach that can, but make no mistake, we think it's on almost every CEO's top of board, top of list for 2025.



I just came out of the Consumer Electronics Show in Las Vegas. And there, what I really saw interesting is AI was moving to the edge. It was, you had to keep your product smarter, faster, better and there was just a lot of work going on there. So, I think there's no doubt though, that every leader that I met wanted to know what was going on in GenAI, how GenAI was impacting, whether you were talking to an automotive person, a manufacturing person, or even someone...I spent a lot of time at the Abbott Labs session.

When you look underneath that, how do you implement it? We're going to talk a lot about it. You really do need some tooling changes. You need to step up to where you're going to go. And you can see that a majority of companies are already making those investments.

And when they look at those investments, they think about what are they going to turn out to do? The top two targets are automation and cyber. That makes no mistake, because those are two areas that need constant catching up. We're always trying to automate, take out errors.

If I can codify it, I can really streamline it. And then on the cybersecurity side, I'm always trying to go against a more and more advanced threat actor that has the same tools I have at their disposal, and I'd argue in many cases are better at collaborating than many of our top enterprises.

The budget switch is maybe the key to this slide. A, budgets are going up for AI, which is good news for us as IT people wanting to do more for our business. And the reality is, as that swing happens, follow the money, follow what your boss is targeted on. I think we can all see where AI sits. It sits right at the top with high expectations. And I think this year is that year where the model maturity is good enough. Now they want to start seeing much more results from it.

## Meet (or Exceed) Customer Expectations

So, the money is one thing. If you go to the next slide, you'll start to recognize and we'll get a little more focused on what we're talking about today and its customer expectations. 84% really are looking at that. And that's important that they're seeing an augmentation of how they deal with customers, where the engagement's at, what kind of context can I bring to that engagement, whether I fully automate it or I just better enable my agents.

I don't know how you behave with your customer center contacts that you have, but I know my patience is now different than it was two years ago. I now expect more. I expect the agent that I get to have at their disposal the right kind of information to solve my query. If I get frustrated, I hang up and I try again.

And I don't know that we all want more calls. We really want to get that first-time resolution up. I want to do some things that are smarter. But I think we see AI, and today's main focus is how do we use it to meet and/or exceed customer expectations? And we all know why we're doing that.

## Improve Customer Retention and Loyalty

On the next slide, we'll talk a little bit about...I think intuitively most of us know there's lots of studies out there, but the reality is keeping the customers we have is three quarters cheaper than getting a new one. It is incredibly different to go find net new customers, especially if you're in a competitive marketplace.



And our expectations as customers, as I just mentioned, is also changing. So, you have this challenge, the people that are getting on top of this, making a name for themselves with outstanding customer service and an ability to retain and give customers an amazing experience. I'm sure you have the same feeling we have. When we leave a client, we want them to feel very excited about what we did.

And that interaction that happens in a contact center, that time is really short. And how do we get the right kind of information to personalize that conversation, to give it context, but still most importantly, how to resolve the query, the question, the ask, the escalation, whatever it is that's come into us. We've got to really pay attention to how we can use these new tools to drive, not just better agent handling in terms of the speed.

I know you'll all be tracking these metrics, how many calls per hour, how many calls per agent, but more importantly, we're going to focus a little bit on the qualitative side, too. I think qualitative experiences are what people are looking for, but looking for high quality personalized engagement from us. You can flip to the next slide.

## Lower Contact Center Cost

I'm not naïve. We started out with a conversation about money. There is always a cost of this. We could build perfect products and services with no customer contact center needs. That would be great. I know we strive for that. We strive for a lot of self service, but at the end of the day, people don't always follow the directions. They don't always install things just perfectly. They may have a defective product. They need to be able to reach out and talk to someone.

AI-driven solutions in multiple studies are showing that the interactions can be reduced by using AI to make that self-serve even better. And then that's cost to serve—really an important step for any of us in the customer care and service business. To drop that by 20% is pretty enormous in today's world. And that's always balanced against the fact that we all know that labor costs aren't going down, which is usually the largest component of our customer care centers.

So, you can see that there's a really good opportunity here. Let's talk a little bit about some things we've seen and how we think we can help you get some of these benefits that this McKinsey study happened to highlight. Next slide. Jason, I think this is where I turn it over to you and you get specific.

## All About Contact Center AI (CCA)

Jason Wisdom: I agree, Chris, thank you. So hi, everybody. So, what I've been doing is I've been involved in AI implementations, specifically around the contact center. I've done a lot of that during the past 12 months. Contact center has been a use case for the AI way back in the mid-2010s when IBM Watson was doing their thing. But recent technologies may have completely changed the game and made what was impossible years ago, almost it'll be standard operating procedure like two years from now.

So, just focusing on the contact center and there's many other aspects of AI that we can do around like meter outage, maintenance planning and infrastructure upgrade. There are so many different areas that we can focus on AI, but today we're focusing on the contact center.t

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## What Are The Challenges Contact Centers Face?

So, what are the challenges contact centers face? Staffs are overworked and underutilized. Customers are not getting answers to what they need and nobody's happy. The call centers are a big expense. Customers are not happy. They always want to speak with a representative. They're never getting their situation handled the way that they want to. Next slide, please.

#### Who Uses CCAI?

Now, call centers are used in every industry that exists from telecom to retail, to insurance, energy, financial services. Every other industry that's not on this page has customer care, customer support. Every single industry is looking for CCAI to be a way in toward making these centers more useful and less costly. Next slide, please.

## How Can CCAI Change Call Centers?

#### Information Retrieval

And so how is CCAI changing call centers today? So, it's helping to do information lookup. So, the customer support rep does not need to place the customer on hold for two minutes or five minutes or call back the next day. That will be a benefit to everybody.

It will suggest responses. So, you can use AI to prepare what the CSR is supposed to tell the customer. And then the CSR can read that, ad lib it or edit it in the way of email exchange.

## **Upselling And Cross-Selling**

There's upselling and cross-selling. So, if there's an opportunity and a customer really fits the profile of what they're looking for, and I'm not talking about an elaborate rules engine that has existed for decades, and I'm not even talking about predictive analytics from a data science perspective, but AI can recognize a profile and an intention based on the real-time conversation that's happening and suggest here's another service that this customer might be interested in.

#### **Fraud Detection**

Fraud detection is, I don't want to say it's old as time, but it's been around for certainly my entire career, not just identifying frauds and money laundering and other nefarious activities, but also recognizing false positives and reducing the number of false positives, again, which makes nobody happy.

## **Predictive Support**

And finally, is predictive support. And this goes well beyond just reducing customer churn, but this is somebody has a situation based on their behaviors. It is likely that they are going to take this action. How do we preempt that and get in front of that and engage with the customer advance? And this is intent recognition through many different behaviors. Next slide, please.



## Use Cases & Approach

These are just some examples. So now I want to go into use cases, AI use cases. When it comes down to it, this is easier said than done. The problem with AI today—and it's always been this problem, but now the AI is reaching saturation—the problem with AI today is still very theoretical. You have all these news headlines and demos from ChatGPT, Google Gemini, Elon Musk, other sources.

There's images, there's videos, there's gold gang, we have multi-billion dollar valuations, we have founders that never smile, we have the rise of Agent Smith all over the world. Every product under the sun is now claiming to be AI. We even have AI infused water. I am not making that up. And it tastes like, drum roll, regular water. So, it's no wonder that a lot of companies have been waiting to see what comes of all this before making a purchasing decision. Next slide, please.

## **Current rSTAR GenAI Use Cases**

Before I dive into the use cases, and you can see many examples of here, I want to repeat part of my introduction. Yes, there are new technologies that are available today. Nobody heard of an LLM or RAG three years ago; most, not even one and a half years ago.

There's a whole, before the problem with machine learning is there wasn't enough data available. Now we have a plethora of data. And even now people are saying there's not enough data, but I think for all of your and my intensive purposes, there's enough data.

There's so much data that's being generated. It's not even being captured. And again, today's AI capabilities are much better integrated with the enterprise than they were a generation ago; in other words, five years ago. But when you think about it, AI has really not changed all that much for 10, even 20 years ago. As a bold statement, but image recognition existed for military targeting computers 20 years ago.

Back in 2001, Large Language Models are built based on transformers, which are based on neural networks, which is based on matrix and vector math, which is literally linear algebra. Vector math and IT has been around for decades.

Everything we're talking about with today's AI is still computer science. You still have quicksort, you still have weightings and biases and probability and statistics, and numerical methods. Everything is still computer science, including the implementation of it all.

Everything you know about software development lifecycle, requirements, testing, custom software development, integration of enterprise software packages that don't play nice into your existing ecosystem. All this has changed not one bit.

So, AI today is not so very different from what you already know, which brings us to these use cases. Now, these are use cases that we have come across that we have worked on. I personally have worked on over 50% of these. These are use cases for generative AI today.



And again, there's a variety of industries. Some of these use cases run cross industry. Everyone has cybersecurity needs, everyone has governance, risk and compliance needs. I mean, just about every industry has that. Every customer-oriented business has a 360 degree of the future of the customer.

## Real-Time Agent Assist

I'm going to focus on three examples that again, I've worked on or had involved discussions with multiple people about. The first is something called a real-time agent assist, which speeds up many tasks, which we've covered already. Instead of placing a customer on hold, you have a window that intelligently gives you the customer history so you can look it up. You can ask questions about the customer history. You can look at a real-time transcript. There's a lot of potential with real-time agent assist.

## Intent Recognition

The second use case is intent recognition. The language that is spoken by the customer, both their translated words in real time and also their emotional sentiment detection. You can understand what the intent is or you can guess what the intent is.

And again, I'm not talking about custom code rules engine, but AI can recognize this, classify the customer's intent and then route the call or escalate the call, if necessary, greatly reducing time and effort to solve their problem, to get them to where they need to be.

The third use case I'll go over just in this call, documents can be ingested and classified almost instantly. Again, not through a complex rules engine, but through an AI engine uses pre-trained models. There are many, many operational efficiency plays that are available through AI. If you had a customer that 150,000 documents and he did not have the staff to read through all of them, these are legal documents, 15-page plus documents and AI can cut through that like a hot knife through butter.

Before I move on, each use case has its own predefined set of measurements of success or KPI metrics. For example, real-time agent assist shows a clear benefit to CSR average handle time. You can easily translate these KPI improvements to ROI and business value. If you're interested in more, get in touch with us. Next slide. I would love to go through more of this, but we are on a time track.

## rSTAR Approach To GenAl

Here, I'd like to start to talk about rSTAR's approach to working with clients. There are many system integrators. There's big four, there's individual freelancers. What does rSTAR give you? What do you get with rSTAR? What can you expect? Well, at a strategic level, we have a three-step process: Capture, Assess, Recommend.

#### Capture

The capture phase is to confirm the organization's vision, goals, and their needs for an AI solution. Is it something they're curious about? Is it something the board is saying, we need this yesterday because we're behind our competitors? Why are you reaching out? Well, why do you need help?



### Assess

The assess phase is to do a deep dive, usually through what we call an AI readiness assessment, which I'll get back to later. But the short of it, this helps us understand where you are, look through use cases you are already considering, because everyone we speak with has at least five or six that they're considering, and they want to get our opinion as sort of a third-party neutral advisor, and maybe brainstorm ideas we have seen working with similar companies, both in your industry, as well as other industries that might apply.

## Recommend

Finally comes our recommendations, which again is based on our personal experience with AI. We break this down into two groups. One is short-term wins, which is three to six months from now, and the other is long-term, which these days means 18 months. Nobody does three-year strategies today in AI, nobody. Next slide, please.

## **Stages of Delivery**

Now I'd like to go into sort of more the tactical implementation of stages of delivery. I don't think there's anything on this slide that is wildly new to anybody. We do try to streamline our delivery to three different phases. Some people have like alpha or pre-alpha or pre-production. We like to keep things simple. So, there's a proof of concept, a pilot, and then a minimum viable production rollout. Some customers want to skip the POC, go straight to a pilot. Some want to skip a POC and go straight to the MVP. That's fine. But I don't think you need any more than this.

If you want to go zero to MVP, that's something we can discuss, but the companies that we work with, utilities and retail and banking, usually have too much compliance and approvals that are required to go from zero to MVP. But again, that's something that we can discuss. Next slide, please.

## Demo – Knowledge Base

Okay, so the next slide of this is going to cover a demo. We've done a lot of talking between Chris and myself, "Well, let's show a demo." Let's showcase a demo here. And I will share my screen. Right now, you see the screen share is off. Give me just one moment. I'm going to cover on our knowledge base, and you should be able to see my screen. Jeanne or somebody, could I get an eye?

## Jeanne Grunert: I can see it.

Jason Wisdom: Oh, wonderful, thank you. So, there are a few different demos that we have on our—there's many clients that we cannot share, but we've recreated three of them on rSTAR service. In the interest of time, I'm going to show you one, and that is the knowledge base. So, the net of this demo is that it takes a library of your own documents and trains a Large Language Model to provide ChatGPT-like results entirely based on your own library.

So, this is a live product; this is not a video recorded demo. Let me just type in a few questions and you'll see what I'm talking about. We've trained this with our own policy documents. You'll see what I mean.



So, "what factors could lead to our customers bill being unusually high?" Let's see what comes back. Now, the results are different every time because this is generative AI, so we kind of don't know what we're going to get, but if you're a customer service rep and somebody calls in and says, "Help, my bill is too high, what happened?" These are some reasons.

Now, this is a rather generic answer, but you'll see at the bottom "For more details, refer to the following documents." And if somebody says: I am signed up for budget billing and why this isn't a budget bill, well, you can click on this and you can double click into any steps. I'm not going to click on any of these because we've disabled outside links for this demo for obvious privacy information. There's nothing super restricted or classified about any of these documents, but we've disabled links for this demo just for safety purposes.

Let's ask another question, a little bit more specific, "How to handle customer complaints." So, this is a CSR just asking the chat bot, and this is basic training information, there's nothing groundbreaking here, but if you have any questions about if somebody is new and they want to understand what is the process to make the customer feel heard, this is some basic information.

And then if I want to double click on this and ask a follow-up question, so you can double click on a question, ask a follow-up. And so, there's many different types of feedbacks that are contained in the policy documents that we've uploaded. However, we have not uploaded survey-specific information.

The reason why I'm showing this is this is your data. This is not a general library. This is not a query, OpenAI's knowledge model. This is your own document and documentation. And so, if you've uploaded policy documents around feedback, then you'll get information. If you've not uploaded policy documents around surveys, you will not get anything useful there.

And again, there is a link. There's always a link. We try to prioritize whenever possible having a link. Let's say a customer is asking about due date extension, and you don't have to phrase it in a nice human English, you can just say what you're looking for to save time. So here are a few things to keep in mind. That's too much information. Just give me what I need to know. And let's see what it does here. So, there's the top three points, that's the same answer, the top three points of what you need. Sometimes ChatGPT has a habit of having two or more pages scrolling by, and if you need your information in shorter, then we do support that.

Let's ask for something that's, again, less generic, but very specific to the policy documents that we uploaded in our library. And again, we have definitions of internal versus external customers, we have examples, and that provides the information. And it is different every time, it's slightly different; sometimes I'll ask and it won't give me the examples, I'll have to ask for an example the second time. This time, I think, because it's getting to know me, I've provided everything that I'm looking for.

Lastly, I want to give an example, let's say something that's not covered by the policy document at all. So, it's not magic. I want to say it's human, but it is limited to the policy documents that you go into, and philosophy has not been part of this library that's been imported.

So, that's the demo. I'm going to stop my screen share, and then we'll go back to the slides, and then I'll talk a little bit more about what we just saw. So, while we're getting to the correct slide, let me just explain a little bit...



So, I do want to offer a few thoughts of how this works. There are two other demos that we have ready to go at a moment's notice, again, where I want to honor time, we did show the knowledge-based demo, this is one of our most popular requests from clients that we have. We have implemented this. It is in production for one of our largest clients, and we're working on it with a number of others.

## Agent Assist

Agent Assist, we, I talked about that before, that's real-time assistance, where you can do a real-time transcript of the conversation, so if you want to scroll back, a customer says, I already told you about this three times, and you look at the transcript, I actually didn't mention this at all, I'm not trying to support CSRs to make customers wrong, but you get the idea, it could be useful.

## **Customer Care Al**

And then finally is a customer care AI, which is a more intelligent chatbot that, Right now, automated chatbots are terrible, they're absolutely awful, and it doesn't have to be that way, and so it's possible to build a better mousetrap this way.

## **Knowledge Base**

I do want to talk a little bit about how the knowledge-based demo works. First, and I want to repeat, this is your data, there's not public data, this not synthetic data, it has not been generated. We have taken many steps to minimize any, to minimize any hallucinations, and I want to say none, because that's not a smart thing to say, but we have taken steps, and we've architected and designed this to minimize hallucinations.

Basically, how it works, I'm not going to go through a reference architecture diagram here, but basically how it works is your own library documents are uploaded into the cloud, an S3 bucket or other object storage layer, Google Cloud Storage, Microsoft Blob Storage, etc., so some sort of object storage layer.

Python function is invoked to translate these documents in something called a vector database, which is a sequence of numbers, but it is a Large Language Model compatible. So we take these binary files, we turn them into vectors, and then we add a layer of prompt engineering to translate and encode chat by users requests.

Obviously, centerpiece is the Large Language Model, Gemini, OpenAI, Cloud, then the knowledge-based application takes the user's query, and it takes the vector database from the library, and it parses both of them together, and the large language model provides answers that is then presented in a familiar ChatGPT-like format that we all love or hate.

This is the GenAI part of this. Every time you ask a question, it will be similar, but not the same. It is generated spontaneously every time you ask a query. There's no caching going on. The AI is trained to answer certain ways based on feedback, etc.

The more data you feed in, the more comprehensive questions you can ask. If I wanted to upload some philosophy, what is the meaning of life, it would give an answer to that. I don't know if you want that, but the more documents are ingested, the more comprehensive of coverage area the knowledge base will be able to give you back.



We also have taken steps to strip out PII. How you define that is a conversation worth having. Some people just date of birth, Social Security Number, credit card number. Other people, well, we want to mask the credit card number, show the last four digits. Other people, we don't want addresses, we consider that PII, whereas the original people might not consider addresses and phone numbers to be PII. We do have ways to strip out PII. Great. That covers the demo.

## **Getting Started with GenAl**

Let's go to the next slide, which talks about how we get started. It will probably be another 10 minutes of explaining our process, and then we'll open it up to questions and next steps. All this is great. How do we get started? Next slide, please.

#### **CCAI** Assessment

As I mentioned earlier, we'd like to start with something called a CCAI Readiness Assessment, GenAI readiness assessment, etc. This is where we do a deep dive, get to know you, get to know your people and your colleagues and your up and down line direct reports, and get to know your systems and what your capabilities are right now.

These are a few chart examples from screenshots from the report. We'll end up with a PDF report, probably around 20 pages, that will say, this is what you have, this is what you're missing, this is what we recommend. Here are your next steps for short and long term. This readiness assessment, the CCAI readiness assessment, gives you a clear strategy roadmap, but I'm not talking like your traditional three-year Gantt chart.

Yeah, we could do that. Everybody does that. It doesn't always mean anything, and time slips by. I'm talking way beyond that. You'll have a clear AI strategy roadmap or blueprint. You'll know exactly what you need to do. We'll help you identify where the cost savings opportunities are, based on the information we have received. We'll use data to help you make decisions, and then we'll look for opportunities for operational efficiency gains, for revenue gains, etc.

Last but not least, we will help you understand where your maturity lies versus your industry peers. Media is going to be a lot further along in AI than insurance. However, nobody wants to be the last person to the table. Some people don't want to be the first person to the table, but you want to make sure that you're still playing the same sport with your competitors.

## **GenAl Prioritization Matrix**

The next slide shows there's another feature of this readiness assessment that I really want to dive into. This is worth an entire slide. This is the Prioritization Matrix. We take all of your use cases, then we score them.

We have a scoring approach. What's the business value? What's the technical complexibility or inverse of feasibility? Things that are high value and easy to implement, that's your low hanging fruit right there. Of course, you'll probably have a couple of use cases that are high in value, but high in complexity or low in feasibility.



Those are your major projects. Then sometimes people will be talking about very often something that is just low in value and high in complexity. It's good to be able to see that on paper. We think this is going to be difficult to implement. We take your use cases that you already have in mind. We will very likely add some of our own. What we see other companies doing in your vertical as well as other verticals, the basis of the conversation might be appropriate. This is a very useful tool in understanding what to do next. This is centerpiece of the readiness assessment. Next slide, please.

## GenAl: Journey to Market

Finally, this is my last slide of content and information, is, what's the journey? Just like every retail customer has a journey, every enterprise has a journey as well. Every track from zero or decentralized AI, which is a polite word for saying siloed, there's a journey to get from where you are, wherever that is, to where you want to be, which is an enviable state that you'll be presenting at conferences, that your company will be getting real business value and ROI out of it, that you'll get a lot of good publicity and attention because your company is really a thought leader in the space and a leader and a pioneer in implementing this.

I'm not talking about bleeding edge kind of technologies that are going to change in three months. I'm talking about what's tried and true and implemented at multiple companies so far. There are many other conversations that we end up having with all of our clients.

One of them, for example, is a build versus buy analysis. Everybody's talking about this. Gartner is pushing this very heavily. A lot of vendors want to be one-stop AI shop. It sounds great. They have fantastic presentations. There are reasons why you want to do this. There's also reasons why you don't want to do this. There are also the due diligence questions that many vendors do not offer up.

We had one client that was really excited about a buy that would take care of all of their AI needs. What they didn't know until it was almost too late is that that vendor only worked with one cloud that this enterprise had no involvement with and no intentions to ever have involvement with that one cloud. That was something that was better to know sooner rather than too late, after the point of no return has been approached.

That's a very generic—that's a very simple example, but a very real-world example of why you want, I'll say, a neutral third party to help you understand the journey. Somebody who's not trying to pitch an individual product, but somebody who's experienced working with many products and with many clients and with many industries that can help you understand standards, best practices, pitfalls to avoid, etc. Build versus buy analysis that I could give a whole report and a whole three slides just on that alone.

We offer hyper-care and sustained support. We know this. We implement this. We've done this for multiple clients. When things are released into production, you want somebody who's there for you, not just to have a support ticket and have a four-hour response window for a severity one outage.

You want somebody who really understands this is not technically an error, but this isn't what we need. You want somebody to be able to provide real hyper-care and real sustained support after the hyper-care period ends. That's something that we do with all of our clients.



Then finally, I'm going to bring it back to business goals and needs. If you're on the business side of the fence, what do you want AI to be able to give you? If you're on the technical side of the fence, what do you need so that you can impress the business and get further funding to grow your purposes? So, that is an area. How does AI actually benefit the business? What else is emerging in this bleeding edge field of AI that is useful? Should you go all in on agentic AI? CEOs are asking this question very often, not knowing what they're talking about.

AI agents, again, that's a whole other topic I could give three slides on, but you want to focus on the practical. What can be done? What is being done? Because you don't want to throw a \$10 million budget on things that are experimental R&D, and then three months later, it's completely obsolete. That's another conversation we could talk about, what is agentable, etc.

To conclude, this diagram shows an overly simple process to take you from where you are to where you need to be. The next step would be to schedule a call, and we'll get to questions now, but the next step would be to schedule a call with me around GenAI, and I can connect you with rSTAR's AI team. I do promise if nothing else, you will learn things that are both helpful and useful.



## Questions

**Chris Moyer:** Hey, Jason. Thanks. Look, there are some questions that people have already added, so we'll go ahead and get to those. First, I just want to really emphasize a couple of those points, Jason, that you brought up. I think the reality is getting started, and I think we probably experimented a lot in 2023 and 2024, but you can see the expectation level in 2025 as we start is much, much higher for tangible results.

They are really looking for us to—as providers of IT services, whether you're internal or using an external, this is the year where we've got to make sure this delivers and make sure that it works. Let me pick up a couple of the questions. I'll read them out, you and I can debate who ought to take them. Maybe I give the high-level, not very knowledgeable answer, and you tip in with the details.

So, the first one is: "How does this improve customer experience and satisfaction in contact centers?" I think, for me, the demo shows it. When you're handling calls, and I've listened in as a contact center agent, but I've met that person listening in to understand the frustrations. We implemented some very large customer care and billing systems at Exelon.

The challenge is, in real time, I want as much context as possible on the incoming call. I want to know who it is. I want to know what their last calls look like. I want their current bill. But what you demonstrated is, that's a great start point, but when they ask a question and it takes me off on a tangent that I may not be the most versed at, I want to be able to get some answers pretty quick. But I know you've seen some other things that we've done to even further drive it. But I think that ability to serve the client in the context of what they ask for is the primary thing that improves customer experience and satisfaction.

**Jason Wisdom:** Yeah. Just to add to what you said, Chris, I would agree with you. The additional angle that I'd like to approach this from. The problem that customers have with FAQ chatbots is they don't answer your question. They're very rigid and limited in their scope. With AI, there's improvisation, there's understanding what is being asked. And very often, you can say, that did not answer my question, can you please try again? And this happens with me all the time, ChatGBT or OpenAI in general, Gemini, etc.

So, if you have a good training library, if you have a good training corpus binder library uploaded, and there's questions that are the long tail of questions, AI is so much better at answering those than FAQ/rules engine chatbots.

**Chris Moyer:** Cool. I completely agree. So hopefully, we answered that question. Another really good question here: "How does this solution set adapt to different languages and cultural contexts?"

So again, I mentioned that I was at CES. That's not because I love Vegas. I just love the ability to get in front of the consumer technology because I truly believe it leads what we're going to see in the enterprise. So, for any of you that are enterprise-focused IT professionals out there, the reason I invest the time and energy to go hang out with 140,000 other people in an overpriced environment is to see what's coming.



And I saw a really good example of this language cultural context by a German company demonstrating the robotic capability. But more importantly, they had it tapped into an AI engine. It introduced, thank you for coming to our booth.

If you have any questions on our product, please ask me. And you can ask me in any language. And watching people interact with it in different languages and then asking someone, okay, was it close? Did it speak Spanish natively? Was the answer good? The answers are good. The answers are very, they got the conversation going. They got the content that they expected. So, I think that's one on the language side. Maybe you can talk a little bit about the training data matters and expand on that and what you've seen.

Jason Wisdom: I can say that language translation is of huge interest right now for any kind of global company and even domestic US company. There's extreme interest in language translation services. That can be added as a feature to an application. You can have a language translation agent. There's a number of ways to approach this. But that is an area that is rapidly growing in terms of maturity. And I think all of major clouds have their own language translation service.

And so, there's a number of ways to approach it. The easiest way would be translate the language and then use the translated text to get your answer back. I realize, Chris, I'm giving more of a tactical answer than a strategic answer. But there's a number of ways to approach that today.

**Chris Moyer:** Yeah, so I think the reality is, yes, it can. And there's different ways to approach that. And I think have some decent expectations because I think you'll be pleasantly surprised.

Another question: "How does this solution and CCAI leverage and enhance? By leveraging it, how do I enhance agent productivity and efficiency?" So maybe the opposite side of that engagement. As a customer, we want to be excited. As an agent, I want to be quick. I want to get on to the next call. I want to show my stats and the leader board climbing up. And I think a couple of things.

One is everybody learns different and everybody absorbs things in a different way. I've done a lot of online training. We've all done it. Sometimes I remember sort of the detail, but I don't remember all of the detail. When I suddenly have an agent sitting beside me, virtual agent, that's GenAI-driven, that I can ask questions in my context around what I remember and what I didn't. You can quickly see and you saw the speed that even your demo ran to show me that next piece of information.

So, I remembered most of it, but I forgot that one piece. Or when someone asked me a question, it's got a really specific set of steps that I need to take maybe for legal reasons or compliance reasons. I want to be able to quickly get that up in front of me, but I only want it there when I want it there. I don't want it there all the time because screen content matters, and I'm usually trying to get to the answer quick.

So those are a couple of ideas around productivity. Have you seen people do other things? I remember you telling me something about a draft email solution and a couple of other ideas that really changed the game.



**Jason Wisdom:** Yeah, there are many applications. There are many use cases that are possible. One that we are working is this, we call it Email Assist, where customers will type in support@rstar.com... We don't have this live. We actually don't have a demo, but we have implemented this in at least one client. Somebody will write support@rstar.com with a question, and we have customer support reps. And again, this is a fictitious example, but this is very representative.

Our customer support agents will open their Outlook, and they'll open their drafts folder, and they'll see a completed draft already ready to go saying, Dear Mrs. Smith, thank you for your inquiry. To answer your question, your bill is high because your usage really spiked during the cold January, for example. And I'm just making this up.

And there's so many possibilities here. There's just training documents, and then there's lookups based on actual data, from customer history data, to weather data, to many different things. So, the sky's the limit in terms of possibilities, but that saves an agent a lot of time.

The other example that I was thinking of, just over the holiday, I was traveling in Europe, and I was not able to log into my bank account because my text message was not working and it was asking me for, "We're sending you a text of your eight-digit confirmation code, please type it in." So, I called Support International. It's like, "What can I do?" International's like, "Oh, hold on. I have to ask around the floor." And he puts me on hold for more than 10 minutes, more than 12 minutes and he said, "I'm sorry, nobody is on the floor. They can help you with that. Can you please call tomorrow?" If you have an AI library, it can just look that right up, you don't have to wait for a supervisor or somebody who has more experience to be able to give you the information that you need.

And he probably could have taken an hour or two hour and opened up many different PDFs to find the information. That's a waste of time. It's a waste of my time as a customer. It's a waste of the customer support rep's time, because he needs to look it up. Those are two ways directly that this can make agents more productive. And it's not like we're talking about layoffs, but we're talking about automating the things that nobody wants to do. AI is really good at that.

**Chris Moyer:** Yeah, I think that's good. I think there is always that fear of, are we going to replace agents? And I think most of the work we've seen so far has been enhancing agents.

Look, I just give you my experience in the utilities industry. We had a challenge keeping the right number of agents all the time. There's always the spiking that happens during weather scenarios. But fundamentally, there's just a group of people that are doing this job that are going to retire. And we don't necessarily have the backfill for them. So, we need enhanced productivity, we need the capability.

You'll see the use case, and importantly, your CEO will see the use case, where a couple of people have went to all virtual and they claim some pretty impressive numbers, but they're in a pretty small domain. I don't think that they're a size that fits everybody yet, but if you're in a new company, maybe in the FSI domain where the questions are very regulated and compliance driven, you can get away with some things. The last question...Oh, go ahead.



**Jason Wisdom:** Oh, yeah, please. Well, I mean, I think every company is unique, but I have heard from vice presidents and up, the intent is to enhance the agent experience so it makes their lives better, and that is the overriding intent.

**Chris Moyer:** I think so. That's where the application of this technology is going right now. The last question is: "What are the integration options for this type of solution when you have an existing customer service platform?" And let me start and then I'll let you add on again. But look, we work a lot in the utility industry.

The utility industry is dominated pretty much by an Oracle suite or an SAP suite, usually enhanced in many cases by a Salesforce suite. Each of those companies will have their own AI story. The reality is that we tend to have a lot more repositories of information that are not inside of the customer service platform. And it needs to be a solution that can reach out, use that and use the source of truth, which many of these are for the customer service. So first, integrating into them. We've done it many times.

There are really straightforward approaches to getting core data out of that customer service platform and using it. But when you bring Gen AI in, you either have to wait for them to implement that feature set in a Gen AI solution that they have, or you enhance it by using good integration technologies, looking at your broader sources of data, which actually make your training data richer, which make your solutions better. So, I think the easy answer is yes.

## Jason Wisdom: Right.

**Chris Moyer:** I think the options really depend on what you've invested in already, how clean you've got your data and how much of that data you want to take in to truly enhance the customer experience and the customer service agents. You talked a little bit about buy/build before, and I think this is that classic question, right?

**Jason Wisdom:** Well, yeah, that's part of it. And I can talk for a long time about some of the other vendors integrations into Oracle Service Cloud. I could drink to some scar tissue around that. Some integrations are challenging, and especially a lot of these newer products, they have Series B and they're taking over the world and they're doing so with confidence. They don't integrate easily into legacy software packages. So, Oracle, SAP, Microsoft, Google, a lot of AWS. That's the original marketplace where you have everything included in the kitchen sink and nothing plays well nice with each other. So, integration is a huge challenge. And people are not going to start everything greenfield. They're going to want to be... Just data sources alone; you have some data sources that are PDF, you have some data sources that are more wiki text format, you have firewall issues. Integration and to get this working the way that it was meant to is no small task.

Then you have coverages. Most buy software packages don't cover everything. In fact, I don't think any software company covers absolutely everything you need to do. So, if you buy two different vendors, both of two series B products, well, you need to integrate them together with each other, and then you need to integrate them with the enterprise. And sometimes the total cost of ownership for some of these packages with your environment is much higher than if you would have built certain components yourself. Azure, Google, Amazon, they have lots of very robust products that have capabilities for themselves.



And so, there are many situations where products are coming out and they make a lot of sense, and they've done what they've done in their industry for 10 years plus, and they can automate your IFR, IVA. There's a lot of shortcuts that can be taken that is a lower TCO. And there's sometimes you just don't want to believe the hype, and it really depends on the company.

It really depends on what you want to do. It depends on what you have so far. It depends on the variety and the difficulty of your data sources. We're talking additional firewalls. That's why we do the assessment, to help you understand what you're dealing with.

**Chris Moyer:** Cool. That is all the questions that we had. I think if you advance to the next slide, you'll see our contact data, which I think is great. And Jason, it's been fun. I really do appreciate your insight and knowledge. I think we turn it over to Jeanne to close us off and let us turn loose our attendees and thank them for joining us.

**Jeanne Grunert:** Sure, guys. Well, thank you very much; appreciate you both. If you'd like more information about CCAI or anything our presenters have spoken about today, please contact us with the information below. You can visit us at rstartech.com for more information. Thank you again for joining us. Take care, everybody.