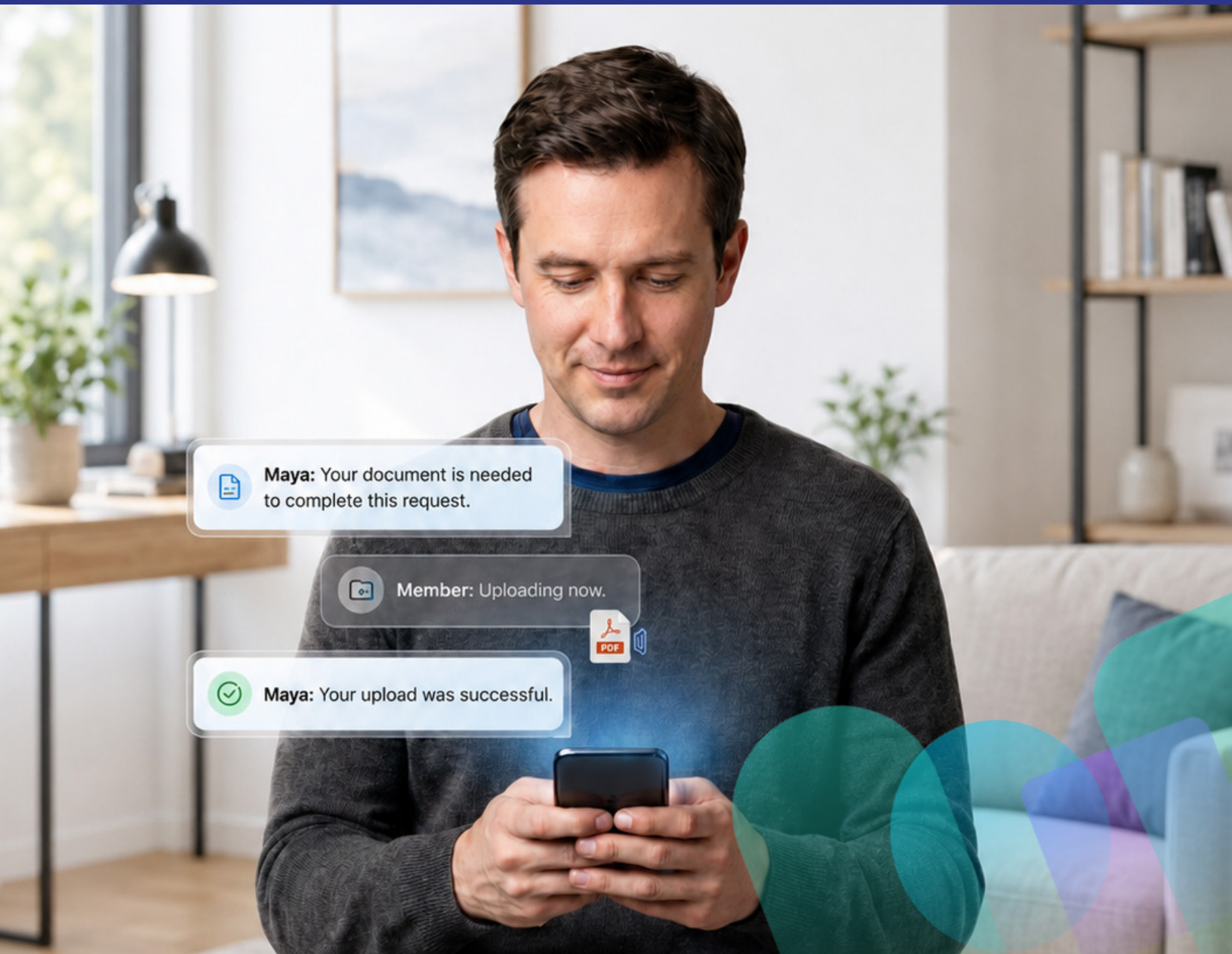





# The 2026 AI Agent Buyers Guide for CX Leaders



 **Maya:** Your document is needed to complete this request.

 **Member:** Uploading now.



 **Maya:** Your upload was successful.

# You're Not Investing in AI Agents. You're Investing in Customer Outcomes.

Customer experience is being reshaped by AI. Enterprises are rapidly adopting AI agents to automate interactions, scale support, and improve responsiveness across channels.

But results remain uneven. While AI can reduce response times and lower service costs, many deployments fail to deliver sustained impact because they are layered onto customer experiences that were never designed to work efficiently.

The opportunity is significant. IBM reports that organizations using AI-infused automation are seeing up to a **30% reduction in customer service costs**, while Gartner predicts that this year, conversational AI will **reduce contact center labor costs by \$80 billion globally**.

The challenge is that most service demand is not driven by complex issues. It comes from broken customer journeys—unclear next steps, missing information, and lack of visibility into progress. AI agents that only answer questions may improve speed, but they do not eliminate the root causes of repeat interactions.

As a result, organizations are shifting from isolated automation to AI systems that can guide customers, complete work, and move interactions forward across the entire journey.

## **This raises a more practical set of questions for CX leaders:**

- Which AI agent platforms can move beyond answering questions to driving outcomes?
- What infrastructure and considerations do you need to make AI agents work at the enterprise level?
- What governance, visibility, and control mechanisms are required to deploy AI safely in regulated environments?

This guide provides a framework for evaluating AI agents as part of a broader customer engagement system—so organizations can reduce unnecessary demand, improve outcomes, and scale customer experience with confidence.

# Why Current Approaches to CX and Automation Fall Short

Enterprises have invested heavily in customer experience and automation. Contact centers have been optimized, self-service channels expanded, and digital tools layered into existing workflows. Yet service demand continues to grow.

The issue is not a lack of technology. It is how customer experiences are structured. Most approaches improve individual interactions, but do not address the breakdowns across the full journey that create unnecessary demand in the first place.

## Where Current Approaches Break Down



### They optimize inbound interactions, not the full experience

Routing calls faster or automating responses improves efficiency, but it does not reduce how often customers need to reach out.



### They resolve questions, but not the underlying task

Customers get answers, but still need to follow up to complete the process—leading to repeat contact.



### They depend on reactive engagement

Most service models wait for customers to initiate the next step, creating delays and driving avoidable inbound volume.



### They operate across disconnected channels and systems

Context is lost as customers move between voice and digital, forcing them to repeat information and restart workflows.



**Kayla:** Is this your current address?

**Member:** No, my new address is 456 Oak Avenue, Irvine, CA 92602.



**Kayla:** Address updated successfully.



## What's Missing

Reducing service demand requires more than improving inbound efficiency. It requires combining:



### Inbound Resolution

where interactions are completed in full context



### Proactive Outbound Engagement

where customers are guided before they need to reach out

Without both, organizations continue to absorb demand that could have been prevented. Despite ongoing investment:

- Interactions repeat
- Workflows stall
- Manual follow-up persists

Contact centers are left managing demand that originates from gaps in the customer experience. Shifting that outcome requires rethinking how customer engagement is structured across the entire journey—not just how individual interactions are handled.

# Internal readiness checklist

Even the most capable AI agent platform will not reduce service demand if your systems, teams, and workflows are not prepared to support it. Before evaluating vendors, use this checklist to assess your readiness.

## Requirement | Ready?

### Your CX tech stack (CCaaS, CRM, backend systems) is API-accessible

AI agents must act in real time across systems to resolve work, not wait on manual processes

Yes  No

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### Security, legal, and compliance are involved early

AI agents must operate within defined governance, not be reviewed after deployment

Yes  No

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### You have defined use cases tied to reducing service demand

(e.g., eliminating status calls, reducing follow-ups, improving completion rates)

Yes  No

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### Security, legal, and compliance are involved early

AI agents must operate within defined governance, not be reviewed after deployment

Yes  No

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### CX, Ops, and IT are aligned on ownership and outcomes

Reducing inbound demand requires coordination across teams, not isolated automation

Yes  No

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### You are factoring in proactive outbound engagement

Inbound deflection alone is not sufficient—customers should be guided before they need to reach out

Yes  No

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### You have a QA and feedback process post-launch

AI agents require ongoing monitoring, tuning, and performance review

Yes  No

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### You've scoped ownership for the AI agent lifecycle

From design and testing to continuous improvement and governance

Yes  No

# Why Most AI Agents Don't Deliver

AI agents are often evaluated on how well they communicate—how natural they sound, how quickly they respond, or how many interactions they can handle.

But that's not what determines success. An AI agent that can respond well, but cannot complete the task, does not reduce service demand.

**In most environments, this gap shows up quickly. The agent can understand the request and provide an answer. But it cannot:**

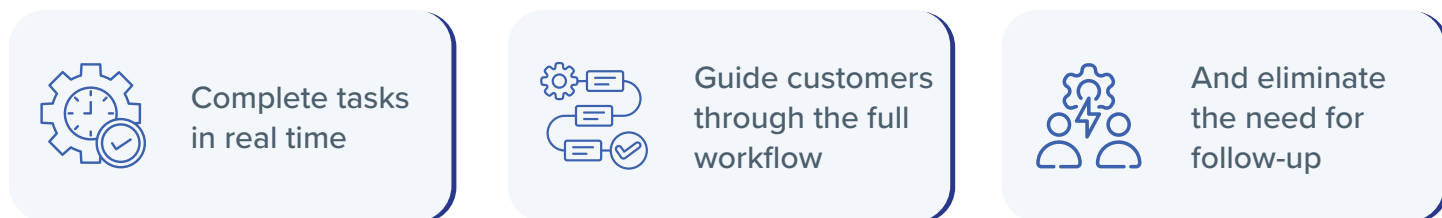
- ✓ access the right systems
- ✓ take action on behalf of the customer
- ✓ move the workflow forward

So the interaction continues—often as a follow-up call. This is why many AI deployments fail to deliver meaningful impact.

The limitation is not the model. It is the system the agent operates within. If the agent cannot connect to core systems, execute workflows, and maintain context across interactions, it cannot resolve the issue—only respond to it.

## What Actually Reduces Demand

Reducing contact center volume requires more than better responses. It requires AI agents that can:



This is what turns an interaction into a resolution. As you evaluate AI agents, the key question is not: How well does it respond? It is: Can it complete the work and prevent the next interaction?

# The Platform Determines Whether AI Agents Work

Most AI agent conversations today sound impressive. That's not the problem. The problem is what happens next.

In real environments, customer requests are rarely just questions. They require action—updating a record, collecting information, triggering a workflow, or moving a process forward. If the AI agent cannot do those things, the interaction doesn't resolve anything. It just shifts the work somewhere else.

That's why many deployments stall. The agent can understand intent and generate a response, but it cannot access systems, execute actions, or maintain context across interactions. The result is predictable: repeat contact, manual follow-up, and no meaningful reduction in service demand.

This is not a model problem. It is a platform problem. For AI agents to be useful in enterprise CX, the platform must do three things well:

- **Connect to systems in real time** so the agent can read and write data, not just reference it
- **Orchestrate workflows across steps and teams** so work actually progresses during the interaction
- **Maintain context across channels and time** so customers don't have to restart every time they engage

Without these, the agent is limited to answering questions. With them, it can complete tasks.

That distinction is what determines whether AI reduces cost—or simply changes how the same demand is handled.



# Common AI Agent Buying Mistakes

Use this checklist to pressure-test how you're evaluating platforms:

- You're prioritizing demo performance over real-world conditions**  
Demos don't reflect incomplete data, edge cases, or system dependencies
- You're evaluating conversation quality instead of task completion**  
A good response doesn't mean the work is actually done
- You're focused only on inbound automation**  
Handling requests more efficiently does not reduce how often they occur
- You haven't validated how the agent operates within your systems**  
If it can't access data or trigger workflows, it will stall in production
- You're treating governance as a later step**  
Security, compliance, and auditability must be built in from the start

## What to Take Away

If these gaps exist during evaluation, they will show up after deployment—when interactions repeat, workflows stall, and manual effort returns.



# How to Evaluate AI Agent Platforms

Most platforms will claim the same outcomes: automation, efficiency, better customer experience. The difference shows up in how they answer specific questions.

## Questions to Ask Vendors

- Can the agent operate using real customer data, not static examples?**  
If it can't reference live context, it won't perform outside a demo
- Can it complete workflows, not just respond to requests?**  
Look for evidence of end-to-end task completion, not partial resolution
- How does it maintain context across channels and interactions?**  
If context resets, customers will repeat steps and create additional demand
- How does it handle incomplete or ambiguous requests?**  
Real interactions are messy—ask how the system recovers and progresses
- What happens when the agent can't complete the task?**  
Escalation should be seamless, with full context passed to a human
- How is proactive engagement handled?**  
If the platform only responds, it won't reduce demand
- How are workflows updated and managed over time?**  
If changes require engineering effort, the system won't scale
- What governance controls are built in?**  
You should be able to see, audit, and control every interaction
- How is performance measured beyond basic metrics?**  
Look for completion rates, repeat contact reduction, and outcomes—not just containment

## What You're Really Testing

These questions are not about features.

They are about whether the platform can operate in your environment, complete real work, and reduce the number of interactions required to get that work done.

# The Shift CX Leaders Are Making

AI agents are quickly becoming a core part of how customer service is delivered. But the organizations seeing real impact are not just adopting the technology. They are changing how they think about customer experience. They are moving:

- From handling interactions to completing work
- From reacting to inbound demand to preventing it
- From optimizing channels to orchestrating the full journey

This is what separates incremental improvement from meaningful change. In these environments, AI agents are not deployed as isolated tools. They are used to:

- Guide customers through processes from start to finish
- Reduce the need for follow-up and repeat contact
- Ensure work progresses without manual intervention

The result is not just lower cost. It is a more predictable, scalable customer experience.

## Where to Start

Most organizations do not need a broad rollout to begin. Start with a small number of workflows where:



Demand is high



Processes are repetitive



Gaps in the experience create avoidable contact

From there, expand—based on what works.

# Why Leading Enterprises Choose Ushur

Once organizations understand that what they are really looking for is a system that can reduce demand, complete work, and operate within enterprise constraints. This is when they turn to Ushur.

Ushur is designed to operate across the full customer experience—not just at the point of interaction. It combines:

**Built for Regulated Industries:** Trusted by healthcare, insurance, and financial services. With tried and true pre-built templates for top industry pain points and support for 74+ languages.

**Trust-Native Architecture:** Built in governance, real-time visibility into agent behavior, and regulator-ready auditability. As well as data protection for PHI, PII and financial data with the highest compliance across HITRUST R2, HIPAA, TCPA, and more.

**Inbound & Outbound Engagement:** Address inbound open-ended inbound inquiries with compliant support. Trigger proactive outbound experiences personalized to customer journeys.

**Omnichannel:** Engage customers in their channel of choice across SMS, email, voice, and web. Seamless escalation to live agents when needed without loss of context means no need to reauthenticate or repeat yourself.

**Speed to Value:** Rapidly design, deploy and manage AI Agents with Ushur's no-code platform with prompt-based workflow creation.

**Actionable Insights:** Query business results in natural language – making it easy to view performance, friction points, opportunities to optimize, and next best actions.

**Enterprise Integrations:** Securely connect AI agents to enterprise systems, CSaaS, APIs, and data.

**Designed to Reduce Contact Center Workloads:** Drive operational efficiency, cost reduction, first call resolution and reduce staff burnout. Ushur does this in four ways:

1. Digital Self-Service for **Call Prevention**

2. Real-time **Call Deflection** to Digital

3. **Seamless Escalation to Live Agents** for telephonic or live chat support

4. **First Call Resolution with Agent Assist** via live agents sending an Ushur for real-time information sharing and e-signature



## Ushur's agentic AI drives better customer experiences and outcomes.

**85%**

increase in CSAT scores

**42%**

reduction in outbound calls through proactive engagement

**90%**

automated resolution rates for targeted workflows

**20%+**

of interactions handled outside business hours

The result is not just better automation. It is fewer interactions required to complete the same work—driving measurable reductions in call volume, improved customer experience, and faster time to resolution. This is why organizations use Ushur to move beyond handling demand—and start reducing it.

[Schedule your custom demo](#)



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