

Striking the Right Balance: Redefining Customer Experience Together with Laivly & Jeff Toister

Practical exercises for balancing AI with Humans.

CALL CENTER CAMPUS | ARIZONA | MAY 19, 2026



TOPIC 1

Automate the CRaP

Automating the CRaP for a Global Travel Membership Business

3 TOPICS. 35% OF EMAIL VOLUME. FULLY AUTOMATED.

Cancellations

Cancel a membership

Renewals

Reverse an auto-renewal

Refunds

Refund a travel purchase

Why CRaP?

Straightforward intent | Clear policies | Consistent volume



\$6 → \$1.50

Cost per resolution

23% → 99.97%

SLA compliance (2 hours)

DISCUSSION 1

What CRaP can we automate?

Confident Repeatabe Predictable

THOUGHT STARTERS

- 1 What are your three highest-volume contacts that follow the same workflow every time?
- 2 Which contacts can a new hire handle confidently in week one?
- 3 What % of your volume is essentially “answer one question, execute one action”?

TOPIC 2

When do humans add extra value?

Beauty Brand Ratings & Reviews: AI drafts, Humans personalize.

WHAT AI DOES

AI fast-tracks to the human part.

Reads every review. Drafts on-brand responses. Does most of the typing.

WHAT THE AGENT DOES

Humans make it personal and unique.

Checks sentiment. Picks the right response. Adds product knowledge, personalization and connection.

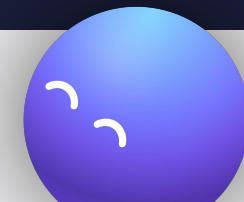
“ We saw a clear satisfaction boost when AI started drafting responses, and agents focused on making it personal. ”

+ 30%

Productivity Boost

+ 6%

CSAT Improvement



DISCUSSION 2

When do humans add extra value?

THOUGHT STARTERS

- 1 Where does the agent's personality or product knowledge change the outcome?
- 2 If AI did the typing, what could your best agents to spend that recovered time doing?
- 3 Where does a "technically correct" response still result in an escalation?

TOPIC 3

How can we help agents build stronger connections?

Morgan & Morgan: When connection *really* matters.

Because every call could be happening on the worst day of their life.

**Sidd does 10+ minutes of work.
AHT dropped 5 minutes.**

***Agents spend that time
connecting with the caller.***

M&M correlates human connection with intake-to-signup.



WHEN AGENTS DO LESS BUSY WORK

They listen better.

They build more trust.

They convert more intakes.

*I can't imagine doing this job without it.
Documenting the case used to take all my focus
off the conversation.*

— Intake agent, Morgan & Morgan

Automating documentation leads to increased conversion

DISCUSSION 3

How can we help agents build stronger connections?

THOUGHT STARTERS

- 1 What's the "worst day of their life" call in your operation? Are your agents listening, or are they busy processing?
- 2 What's stealing your agents' attention during the call — system navigation, note-taking, lookups, after-call work pulled forward?

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