OSF|DIGITAL

From Cost Center to Value Engine:

Redefining Contact Centers for High ROI and Low TCO

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Executive Summary

Customers today expect effortless support and seamless, personalized experiences across all channels — and businesses are under pressure to meet these demands while lowering operational costs. This whitepaper outlines a strategic roadmap for service transformation that meets this challenge head-on, blending omnichannel orchestration, automation, and AI to drive **high ROI and low total cost of ownership (TCO)**.

We explore how organizations can **reimagine the contact center** to deliver best-in-class service by focusing on five transformation pillars:

Serve customers where they are through a truly **omnichannel experience** — from voice to messaging apps, live chat to self-service portals.

Deploy autonomous agents with next-generation capabilities to resolve routine cases, enabling **24/7 support** with high containment rates and improved CSAT.

Maximize agent productivity by deflecting repetitive inquiries, empowering human agents to focus on high-value interactions that require empathy and expertise.

Equip supervisors with a **unified, real-time view** of performance metrics, case trends, and agent activity — streamlining coaching and workforce management.

Accelerate time to value with OSF's modular, Salesforce-native approach—leveraging pre-built solutions that reduce complexity and ensure scalable outcomes.

Designed for **service and contact center leaders, IT stakeholders, and contact center supervisors**, this paper offers actionable guidance on building a service ecosystem that's intelligent, agile, and customer-centric. Whether you're optimizing an existing Salesforce implementation or beginning a digital transformation journey for your service and support channels, the strategies outlined here will help you modernize operations, elevate customer experience, and deliver tangible business results.

From Multichannel to Strategic Orchestration

The evolution of service channels has accelerated dramatically — from traditional phone support to multichannel contact centers, and now to **intelligently orchestrated, omnichannel ecosystems**. Yet many organizations remain stuck in the multichannel phase, where channels exist side by side but operate in silos. Customers can reach you via phone, email, chat, or social media—but behind the scenes, these interactions are often disconnected.

The impact is clear:

- **Customers are forced to repeat themselves**, undermining trust.

- **Agents lack context**, leading to slower resolution and frustration.

- **Leaders can't see the full picture**, making it difficult to manage performance or optimize processes.

Strategic Orchestration: The Modern Mandate

To meet rising expectations and reduce operational overhead, leading organizations are adopting **strategic orchestration** — a coordinated approach that connects people, processes, and platforms into a single, intelligent service delivery model. This isn't just about technology — it's about enabling **effortless, personalized service** that scales with efficiency.

Customers now expect to move **fluidly across channels** — from a chatbot on a product page, to a follow-up email, to a live agent — **without losing context** or repeating information. This expectation is the new baseline. Failing to deliver it leads to increased churn, negative brand perception, and lost revenue.

Pillars Of An Orchestrated Omnichannel Experience

Integrated Contact Points:

All service channels — voice, email, live chat, messaging apps (e.g., WhatsApp), social media, and self-service portals — must be fully connected via a unified platform like Salesforce Service Cloud, enabling consistent service logic and access to customer context at every touchpoint.

Seamless Handoffs:

Intelligent routing and escalation allow customers to transition smoothly from bots to agents, or from one channel to another, without repeating themselves. This reduces friction, boosts satisfaction, and increases first contact resolution (FCR).

Real-Time Data Synchronization:

Agents and supervisors must have access to a Customer 360 view — including previous interactions, product usage, preferences, and intent. This empowers agents to deliver faster, more relevant service, while supervisors gain oversight into cross-channel performance.

Centralized Supervision:

Supervisors need real-time visibility into KPIs, queue status, and agent activity across all channels. Tools like Omni-Supervisor and CRM Analytics empower them to coach in the moment, adjust resourcing dynamically, and monitor AI-assisted interactions with confidence.

Why it Matters

An orchestrated strategy enables you to **contain more cases, escalate fewer**, and **resolve faster** — all while creating more natural, human-centered experiences. The result is more than operational efficiency. It's **higher CSAT and NPS, reduced agent burnout**, and a **smarter, more resilient contact center.**

Strategic orchestration isn't an add-on — it's the foundation of a future-ready service organization.

The Strategic Role of Channels in Contact Centers

In a high-performing contact center, service channels are not just communication mediums — they are **strategic business assets**. When thoughtfully designed and intelligently orchestrated, each channel becomes a lever to control cost, elevate brand perception, and deliver exceptional customer outcomes.

A modern channel strategy must go beyond availability — it must ensure that every **customer query lands in the right place**, is resolved with the **right level of effort**, and delivers the **right business outcome**.

Why Channel Strategy Matters

Cost-to-Serve Optimization:

Different channels have vastly different costs. A single phone call can cost 5–10x more than a self-service interaction. Smart channel strategies **match effort to value**, reducing waste and increasing ROI.

Faster, Smarter Resolutions:

Assigning the right interactions to the right channels boosts **First Contact Resolution (FCR)**, slashes **Average Handle Time (AHT)**, and reduces customer frustration.

Customer Loyalty and Trust:

Consistent, timely support across preferred channels improves **Net Promoter Score (NPS)** and **Customer Satisfaction (CSAT)** — both critical to long-term retention and brand equity.

Scalability Through Automation:

With the right blend of **AI, bots, and live agents**, you can deflect low-value queries and free up your human workforce to handle more complex, meaningful interactions.

Understanding the Role of Each Channel

A strategic channel mix is rooted in **intent-based design** — not tradition or convenience. Here's a breakdown of the most common service channels and their ideal use cases:

Phone
Still essential for urgent, high-emotion, or complex scenarios (e.g., complaints, escalations, financial disputes). But it's resource-heavy, and best reserved for high-value use.

Email
Useful for asynchronous queries requiring detailed, documented responses. Low urgency, but can lack immediacy and personalization. Should be optimized with automation and response templates.

Live Chat (Web/In-App)

Ideal for immediate, transactional support. Often powered by **AI bots for initial triage**, with handoff to agents. High CSAT potential when staffed and integrated properly.

Messaging Apps (e.g., WhatsApp, SMS)

Fast, convenient, and familiar. Enables asynchronous conversations and great for mobile-first users. Effective for updates, confirmations, or low-effort inquiries.
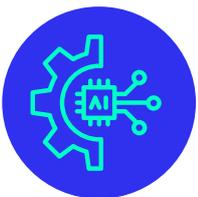
Social Media

Public-facing channel with brand visibility. Great for fast responses and proactive service, but requires structured workflows to manage risk and sentiment.

Self-Service Portals & Knowledge Bases

Foundational for deflection. When properly maintained and searchable, self-service can resolve up to **30–40% of tier-1 queries** before they reach an agent.

Autonomous Agents

No longer just basic FAQ engines — today's autonomous agents understand intent, hold context, and even **summarize conversations** for handoff. High containment, especially with Salesforce Agentforce.

# The Power of an Intent-Aligned Channel Strategy

Rather than defaulting to channel proliferation, leading organizations **curate** their channel strategy based on:

- **Customer behavior and preference**
  (e.g., generational or regional differences)

- **Query complexity and urgency**

- **Cost-to-serve thresholds**

- **Containment and automation potential**

This approach delivers two outcomes:

1 **Operational Efficiency:**

Lower cost-per-contact, higher agent productivity

2 **Customer-Centricity:**

Seamless, satisfying support across any channel they choose
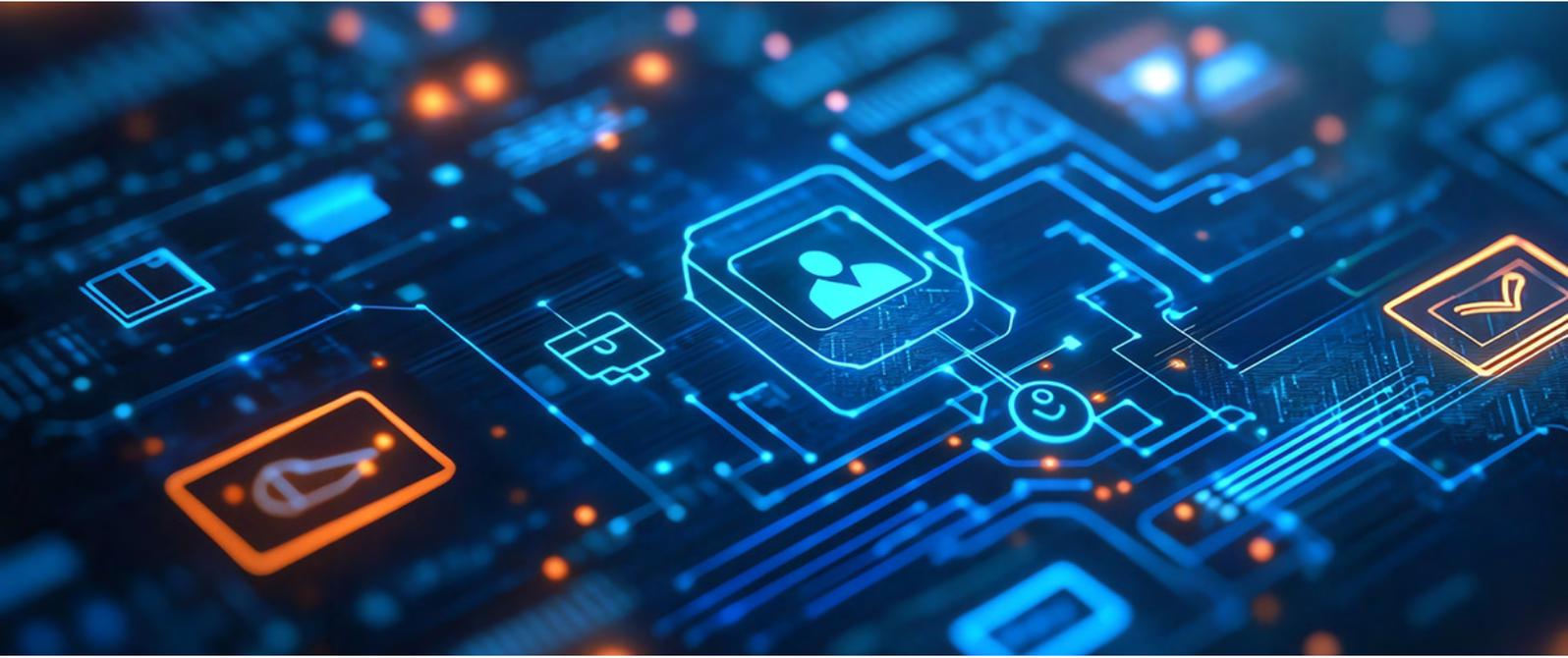
Designing a Channel Strategy that Works

In an age of customer-driven expectations and constrained budgets, designing an effective channel strategy is no longer a tactical task — **it's a strategic differentiator**. The best-performing organizations build their service ecosystems with precision, intent, and adaptability. This means every channel added — or optimized — must contribute measurable value: to customers, agents, and the bottom line.

At OSF, we guide organizations through a modular and pragmatic framework that aligns operational priorities with customer behavior and future-ready architecture. Our approach ensures you not only meet today's needs, but scale into tomorrow with confidence.

Core Pillars of an Effective Channel Strategy

Rather than defaulting to channel proliferation, leading organizations **curate** their channel strategy based on:

1 ## Customer Preferences & Behavior

Your strategy must begin with a deep understanding of how your customers want to interact. Journey mapping, voice-of-customer data, and behavioral analytics help identify:

- **Preferred channels by segment** (e.g., younger audiences gravitating toward chat and messaging)
- **Common service intents** (e.g., "Where is my order?" or "How do I reset my password?")
- **Frustration points** (e.g., channels with repeated drop-offs or escalations)

This customer insight is foundational to prioritizing the right channel investments.

2 ## Containment Potential

Not all inquiries need a human agent—and not all bots should try to replace one. The key is to identify high-volume, low-complexity service requests that are ideal for automation, such as:

- **Password resets**
- **Order lookups**
- **Appointment confirmation**

Businesses need to create intelligent containment paths that deflect traffic while maintaining satisfaction.

3 Cost Efficiency & ROI Modeling

Each service channel has a distinct cost profile. Email and voice support are labor-intensive, while chatbots and self-service portals operate at a fraction of the cost. Through cost-per-contact analysis and channel ROI dashboards, OSF helps organizations:

- **Understand total and marginal channel costs**

- **Prioritize changes that offer rapid time to value**

- **Align budget with outcome-based metrics** (e.g., CSAT, resolution time, agent productivity)

4 Organizational Readiness

Technology is only half the equation. Your agents, supervisors, and support processes must be capable of delivering a consistent omnichannel experience. We assess:

- **Digital and process maturity**

- **Agent readiness across digital vs. voice channels**

- **Governance and change management structures**

This ensures every step of the strategy is achievable—not just aspirational.

Measuring Performance Beyond CSAT

Traditional customer satisfaction (CSAT) scores are no longer enough to capture the full impact of a contact center's performance. In today's omnichannel, AI-driven environment, service leaders must adopt a broader, more dynamic set of metrics that reflect both operational efficiency and customer experience outcomes.
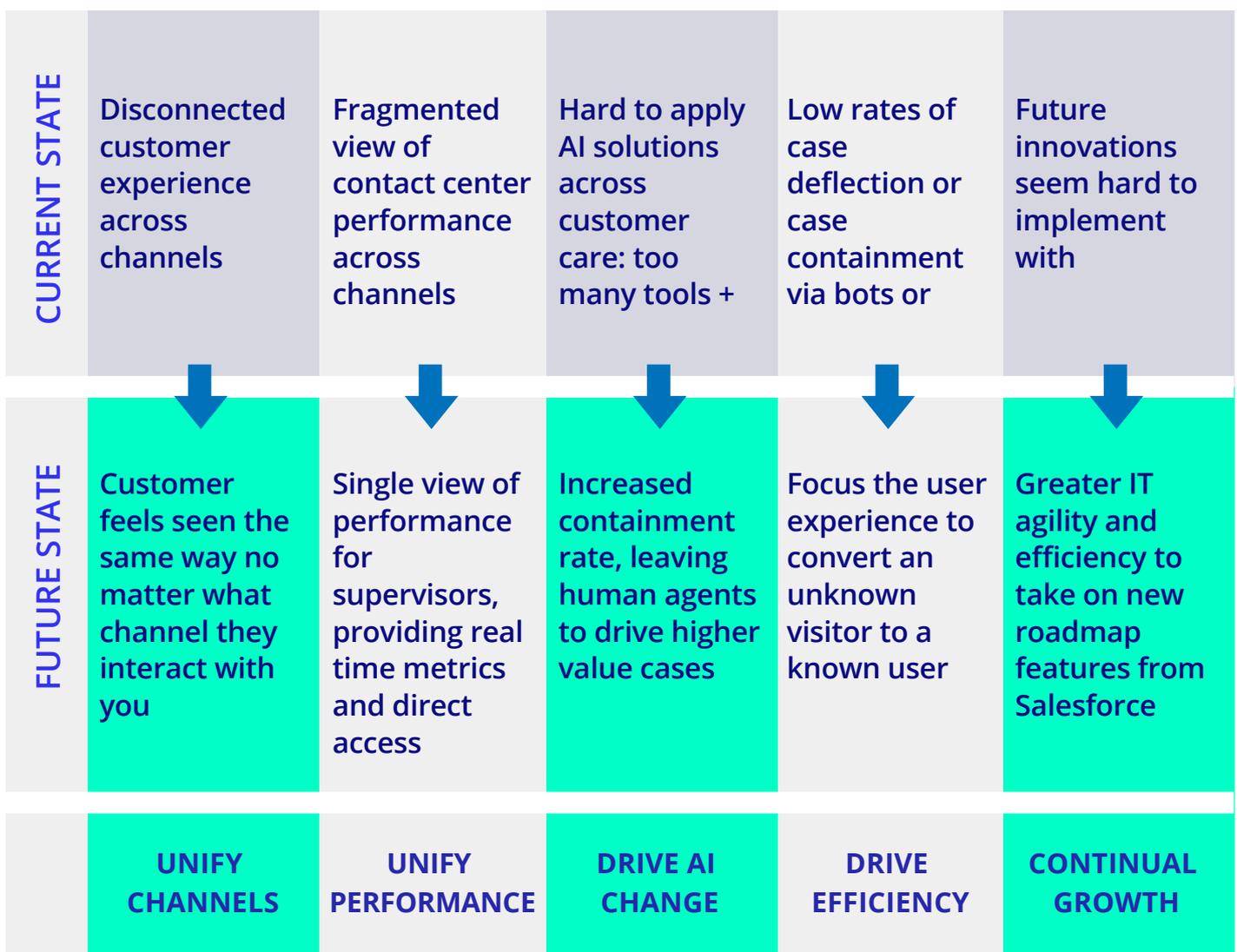
This section introduces a performance measurement framework that moves beyond simple feedback surveys. It highlights how forward-looking organizations evaluate value through **containment rates, agent productivity, supervisor enablement, cost reduction, and AI-driven insights** — all of which contribute to a **more resilient, higher-ROI contact center operation**.

Through a series of transformative shifts — captured across the next few pages — you'll see how leading businesses move from fragmented tools and siloed reporting to:

- A **unified view of performance** for agents and supervisors
- Embedded **AI and automation** that measurably increase productivity
- **Containment and deflection strategies** that reduce costs and empower customers
- Clear, quantifiable KPIs that link every layer of the operation to business outcomes
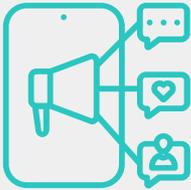
This evolution isn't just technological—it's architectural and strategic. The following visuals and capabilities illustrate how organizations can go beyond CSAT to build a **future-ready contact center that delivers measurable, continuous value**.

Key Shifts in the Service Experience

CURRENT STATE	Disconnected customer experience across channels	Fragmented view of contact center performance across channels	Hard to apply AI solutions across customer care: too many tools +	Low rates of case deflection or case containment via bots or	Future innovations seem hard to implement with
FUTURE STATE	Customer feels seen the same way no matter what channel they interact with you	Single view of performance for supervisors, providing real time metrics and direct access	Increased containment rate, leaving human agents to drive higher value cases	Focus the user experience to convert an unknown visitor to a known user	Greater IT agility and efficiency to take on new roadmap features from Salesforce
	UNIFY CHANNELS	**UNIFY PERFORMANCE**	**DRIVE AI CHANGE**	**DRIVE EFFICIENCY**	**CONTINUAL GROWTH**

Key Capabilities For Success

Strategic Goals

Unlock greater productivity in customer service

Deliver a richer customer experience

Agility and efficiency in IT and roadmap

Solution Use Cases

Better utilize human power

- AI agents contain more simple cases
- Unified routing / skills to leverage agent skills
- Unified supervision for fast adjustment / reporting

AI Productivity Tooling for Humans

- Case classification for fast routing
- Work summaries show case highlights
- Suggested replies enhance interaction speed

AI Agent Driven Conversations

- Better interaction with natural language
- Greater capability to understand and solve
- Seamless transfer to human agent

AI Powered Customer View

- Important data accessible and available to agents
- Customers feel seen and not starting again
- First chat bot they have been happy with

Voice Automation & Intelligence

- AI agents contain more simple cases
- Unified routing / skills to leverage agent skills
- Unified supervision for fast adjustment / reporting

OOTB feature set and roadmap

- Rich set of OOTB features reduces IT workload
- Solid roadmap enables features with low cost
- Configuration over Coding for agility

Key Value Drivers

Customer Experience

▲ CSAT / NPS / CLV

▲ Customer Retention

▲ Self Service / Deflection

▲ AI Resolution / Containment

▼ Time To First Response

Service Agents

▼ Post Call Wrap Up Time

▼ Start Of Call Ramp Time

▼ Average Handle Time

▼ Agent Attrition

▼ Onboarding Time

▲ First Contact Resolution (FCR)

Supervisors

▲ Supervisor Productivity

▲ Agent Productivity

▼ Onboarding / Training Cost

IT Efficiency

▼ Engineer Hours (Build & Maintain)

▼ Speed To Deploy New Features

▲ Consolidation Of Technology

Quantifiable Business Value Benefits

20%

Deflection / Containment

Driving deflection through an excellent knowledgebase and customer portal showing customer information and options.

Creating containment with next gen AI agents solving majority of simple cases at speed with high CSAT, as tech develops, continue to drive more containment.

15%

Agent Productivity

Full customer context drives faster outcomes from seeing the entire picture and seamless transfers.

AI tooling enables faster case ramp as well as short case wrap up (summaries) plus faster interacts with suggested replies from the knowledgebase. All lowering average handle time.

5%

Supervisor Productivity

Faster and more direct coaching via call transcriptions, easy listen in tooling and easy view of Agent KPIs.

Drive insights with AI assisted dashboards spotting trends and issues in real time based on agent workloads and resolutions.
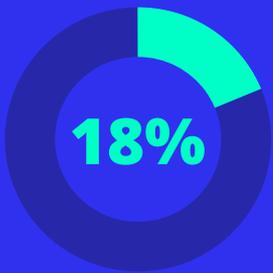
12%

Onboarding Speed

Supervisor tooling / recording gives better tooling and examples for new agents to ramp quickly.

Reduced set of use cases due to AI assisted containment driving less handling of simple use cases, giving more time for the more involved tasks.

Less manual work.

18%

Vendor / IT Cost Takeout

Simple IT landscape means less vendor management, license costs overall.

Greater OOTB feature set drives less engineering time building out solutions.

Unified data model drives less engineering time integrating solutions together to achieve same outcomes.

How AI Enhances Contact Center ROI

Artificial Intelligence (AI) has shifted from a promising trend to a mission-critical enabler of modern contact center success. For organizations seeking to reduce operational costs, improve agent productivity, and deliver elevated customer experiences, AI is the most powerful lever for unlocking return on investment (ROI). When deployed strategically across service channels, AI delivers immediate efficiencies—and sets the stage for scalable, future-ready operations.

Below, we break down how AI enhances ROI across five critical performance levers:

1 Automating Routine Tasks and Reducing Costs

At the core of AI's value is its ability to **handle high-frequency, low-complexity interactions**—those that traditionally tie up agents without adding strategic value. Autonomous agents resolve common inquiries like order status, FAQs, password resets, and appointment confirmations, freeing agents to focus on escalations and complex use cases.

AI also automates backend workflows such as:

- **Post-interaction wrap-ups**
- **Ticket categorization**
- **Case routing and prioritization**

This reduces manual effort and human error, driving down labor costs and improving consistency.

2 Improving Agent Productivity and Efficiency

AI doesn't just replace manual work — **it augments the human agent experience**. Tools like Salesforce Agentforce and Einstein Assist surface:

- **Real-time response suggestions based on customer sentiment**

- **Workflow checklists tailored to context**

- **Knowledge article recommendations**

In tandem with intelligent routing, AI ensures customers are connected with the right agent at the right time, reducing Average Handle Time (AHT) and improving First Contact Resolution (FCR).

Supervisors benefit too. AI can monitor and score interactions to identify coaching opportunities, improving agent development and long-term performance.

3 Enhancing Customer Experience and Satisfaction

The expectation today is 24/7 service. AI enables this by powering always-on digital channels, ensuring fast, consistent support even during off-hours or peak demand periods.

AI also brings intelligence to the interaction itself:

- **Real-time sentiment analysis** identifies when a customer is becoming frustrated or confused

- **Next-best-action suggestions** help agents tailor responses for empathy and relevance

- **Seamless escalations** between bots and humans reduce friction

These capabilities contribute to hi**gher CSAT, NPS, and loyalty scores** — which in turn drive retention and revenue.

4 **Providing Actionable Analytics and Insights**

AI systems don't just respond—they learn. By analyzing vast volumes of interaction data, AI generates:

- **Real-time dashboards of service performance and trends**
- **Insights into customer behavior and unmet needs**
- **Automated detection of bottlenecks or quality issues**

This creates a continuous **improvement feedback loop**, allowing leaders to make proactive decisions around resourcing, channel mix, and service design.

5 **Scaling Operations and Forecasting Demand**

AI allows organizations to **scale without scaling headcount**. Chatbots and voicebots can handle thousands of concurrent sessions, absorbing spikes in demand without overstaffing.

AI-driven forecasting models also help contact centers plan smarter by:

- **Predicting call volumes by day, time, and campaign**
- **Recommending optimal staffing levels**
- **Informing long-term workforce planning**

These capabilities support **elastic service delivery models** that align cost with demand.

6 **Quantifiable Impact on ROI**

When implemented effectively, AI delivers measurable results. Organizations leveraging AI in the contact center report:

- Up to **60% cost reduction** through automation
- As much as **90% reduction in manpower needs** for repetitive tasks
- Customer satisfaction increases of **27% or more**

AI directly improves key KPIs like FCR, AHT, CSAT, and NPS — all of which correlate with better business outcomes and lower total cost of ownership (TCO).

Ai's Impact On Key ROI Drivers

Area	AI Contribution	ROI Impact
Cost Reduction	Automates routine tasks, lowers labor costs	Higher profit margins
Agent Productivity	Real-time assist, smart routing, training support	More queries handled, faster resolution
Customer Satisfaction	24/7 support, instant responses, personalization	Higher retention, loyalty
Analytics & Insights	Actionable data, performance tracking	Better decision-making
Scalability	Handles high volumes, forecasts demand	Efficient growth

Organizational Readiness and Change Management

Technology alone doesn't transform a contact center — **people do**. While AI, automation, and orchestration platforms form the digital backbone of modern service operations, long-term success hinges on cultural alignment, cross-functional ownership, and workforce empowerment.

True transformation requires a shift in mindset as much as in tools. That's why OSF places equal emphasis on **organizational readiness** and **change management**, ensuring your teams are equipped, engaged, and aligned to make new service models succeed.

Key Dimensions of Readiness and Change

Today's agents need more than call-handling expertise. As customers move across live chat, messaging apps, self-service, and voice, frontline teams must be equipped to deliver consistent, high-quality service across multiple channels. This includes:

- **Fluency in asynchronous communication**
- **Empathy and tone calibration** across digital mediums
- **Confidence using AI-assisted tools** like auto-suggestions, knowledge prompts, and case summarization

Cross-Functional Governance and Ownership

Omnichannel service doesn't operate in a vacuum. It requires coordination between Service, IT, Operations, and Customer Experience teams. Governance frameworks should clarify:

- **Roles and responsibilities** across the channel lifecycle
- **Ownership** of escalation paths, workflows, and feedback loops
- **Shared KPIs** that bridge channel performance and customer outcomes

Trust and Transparency in AI and Automation

Resistance to automation is natural—especially when agents or supervisors worry about replacement or loss of control. Building trust in AI begins with:

- Transparent logic in **AI tools** (e.g., why a case was routed or escalated)
- Demonstrating how **automation assists**, rather than replaces, the human role

- **Using data** to show measurable value in time saved or outcomes improved

Supervisor Empowerment with Real-Time Tools

Supervisors play a pivotal role in sustaining performance across service channels. With more distributed, asynchronous, and bot-assisted interactions, they need modern tools to:

- **Monitor agent activity** and channel volume in real time
- **Access conversation** summaries and transcripts for coaching
- **Identify training needs** based on interaction data and performance trends

Roadmap Alignment with Organizational Maturity

No organization can transform overnight. Successful change initiatives prioritize according to digital maturity, operational bandwidth, and staff readiness. This means:

- **Rolling out channel** and **AI capabilities** in manageable phases
- **Aligning deployments** to available skills, training cycles, and adoption capacity
- **Measuring progress** through capability benchmarks and user feedback

The Road Ahead

The future of customer service isn't just more channels — it's smarter, more **intent-driven** service that dissolves the boundaries between platforms, moments, and modes of engagement. As customer expectations evolve and AI capabilities mature, the most successful contact centers will be those that design experiences around **context and continuity**, not just channel access.

Modern service strategy is shifting from reactive support toward proactive, predictive engagement. To prepare for what's next, organizations must build on today's orchestration foundations with future-facing architecture, adaptive processes, and scalable intelligence.

Emerging Principles of Future-Ready Service Design

✅ Channel-less Customer Journeys

Service will no longer be defined by where it happens — but by how effortlessly it flows. The focus will shift from channel-specific design to **customer intent orchestration**, where users can start a journey via WhatsApp, follow up by email, and receive resolution in-app — without any loss of context, continuity, or personalization.

✅ Predictive and Proactive Service

With tools like Salesforce Data Cloud, contact centers will move from "how can we help you today?" to "we've already spotted the issue." Predictive analytics and behavioral signals will enable systems to anticipate needs, surface solutions before customers ask, and resolve **problems before they're felt**.

✓ AI-First Service Architecture

Rather than viewing AI as a layer added after-the-fact, future contact centers will embed intelligence into the **core design of every workflow**. From real-time case triage and knowledge suggestions to autonomous agent conversations and smart escalation paths, automation will drive efficiency — while human empathy adds the finishing touch where it matters most.

Agility Today = Resilience Tomorrow

Preparing for these shifts doesn't mean overhauling your entire infrastructure — it means investing in modular, **AI-enabled systems today** that can evolve alongside customer needs and market trends.

By prioritizing unified data models, scalable automation, and employee readiness now, organizations position themselves to not only keep up with tomorrow — but to lead it.

How OSF Digital Helps

OSF's Services & Channels proposition delivers the highest ROI solution for contact center transformation:

- Rapid time to value with Salesforce-native modules

- AI-led containment and automation across all channels

- Unified data and performance view for agents and supervisors

- Modular transformation to reduce technical debt and improve adoption

We partner with you to reduce agent headcount, deflect low-value cases, and deliver consistent, personalized service experiences — driving high satisfaction and low total cost of ownership.

OSF | DIGITAL

OSF Digital is a global leader in digital transformation, helping businesses elevate customer service and engagement across every channel. As a Salesforce multi-cloud expert, OSF Digital enables organizations to deliver unified, AI-powered service experiences — online, in-store, and beyond. Through intelligent automation, data-driven insights, and seamless channel integration, OSF empowers service teams to anticipate needs, resolve issues faster, and create meaningful, lasting customer relationships.

Contact us to learn more

Thank You

Connect with Us