

9 ways to get the most from CX conversation summarization

Use this 9-factor scorecard to help determine if your current approach to summarization is providing the best information in the most efficient way possible.

Does your disposition summary...

...capture what happened in the conversation?

1 2 3 4 5

A “5” means you get highly precise details with deep semantic meaning.

...supply data that is analytics ready?

1 2 3 4 5

A “5” means you get structured data for your CRM and analytics tools to feed insights.

...provide full context for future engagements?

1 2 3 4 5

A “5” means summaries build an easily accessible history of interactions with the customer.

...unlock rich insight about your customers?

1 2 3 4 5

A “5” means notes help you examine customer motivations, preferences, and experiences.

...elevate agent coaching efforts?

1 2 3 4 5

A “5” means summaries are searchable by agent and topic to support better feedback.

...summarize calls and chats instantly?

1 2 3 4 5

A “5” means key notes are compiled and categorized as the conversation transpires.

...work seamlessly for both voice and digital?

1 2 3 4 5

A “5” means the process is optimized across channels, aided by accurate voice transcription.

...generate notes automatically?

1 2 3 4 5

A “5” means summarization is automated, reducing handle time.

...make agents happy?

1 2 3 4 5

A “5” means the process alleviates tedious post-interaction work.