CONVERSATIONAL AI FOR CX

VENDOR PULSE REPORT

Contents

Check your preferred vendor's ranking

Click on your vendor to jump straight to its detail page.

* If your PDF viewer disables links, use the page numbers of each vendor section.

Letter from VOX

Dear Leaders,

The AI landscape continues to evolve at an **unprecedented pace**, especially over the last few months. Our Research team has been listening to your **consensus voice** and has surfaced areas of **strong interest in Conversational AI**—alongside the concerns, hesitations, questions, and need for guidance you've shared.

Conversational AI is becoming a **crowded space**. To help you navigate it—and to help vendors differentiate their solutions around your needs—we have completed our first **Vendor Mapping** in Conversational AI.

This report gives you a peer-driven view of the **vendor landscape, based on CX leaders' April preferences**. Using data gathered from leaders like you over the past four weeks, we mapped every Conversational AI vendor serving **retail and eCommerce** and measured how each meets your **dynamic challenges and preferences.**

Many leaders treat this work as a **pre-RFI**: a quick way to decide which vendors deserve a deeper look. All vendor information comes from public documentation, and each vendor was invited to adjust its profile. For every answer, we include references to the source material and clear paths to contact the vendor if desired.

While we continue to work with vendors through VOX to keep them aligned with your dynamic preferences, this report remains **completely unbiased**—including for vendors already using VOX. Our goal is to give you an unbiased snapshot of how the market aligns with your real-time needs and preferences.

We hope this report **sheds more light** and **brings clarity** to any **urgent questions or concerns** you have. We'll keep monitoring your preferences and providing continuous guidance as the landscape evolves.

Read it, share it, challenge it. Together we'll keep the market aligned with your voice.

Avetis Ghazaryan
Co-Founder & CEO, VOX Wins

Executive Summary

What CX Leaders Are Saying

VOX's April data from retail and eCommerce leaders surfaced ten recurring priorities and concerns:

1. **Regulation & Disclosure** – clarity on AI-use notices and evolving privacy laws
2. **Data Security** – airtight controls, audit trails, role-based access
3. **Trust & Frustration Signals** – reliable sentiment detection and graceful hand-off
4. **Efficiency & ROI** – proof of ticket deflection, AHT cuts, FCR lift
5. **Implementation Reality** – low-code connectors for legacy CRMs and commerce stacks
6. **Personalization** – product recommendations driven by live CDP data
7. **Measurement** – real-time dashboards that tie AI chats to service and revenue KPIs
8. **Future Road-map** – generative / agentic AI and voice parity
9. **Service & Support** – continuous tuning, not "set-and-forget" deployments
10. **Transparent TCO** – usage-aligned pricing and clear expansion costs

Vendors in Scope

Forethought · The Loops · Capacity · Satisfi Labs · Gorgias · Inbenta · Freshworks · Rep AI · Kustomer · Quiq · eGain · IBM · Pypestream · Siena AI · Gladly · OneReach.ai · Aisera · Interactions · Ada · [24]7.ai · Netomi · Kore AI · LivePerson · Salesforce

What This Report Does

VOX rated each Conversational-AI platform against the real-time preferences CX Directors and VPs voiced in April. Those preferences became 20 yes/no questions. For every vendor we track two numbers:

- **Preference-Coverage** – how many of the 20 questions the platform can credibly answer today
- **VOX Score** – the weighted consensus score attached to each question the vendor clears, showing how closely its capabilities line up with what leaders say they need right now

The result gives you:

1. The latest, most urgent preferences your peers have around Conversational AI.
2. How the CAI market is responding to those needs.
3. A clear view of how each vendor meets today's dynamic CX requirements.

Key Findings

- **Privacy & Disclosure –** Leaders expect airtight data controls and upfront AI notices; most vendors now meet the baseline.
- **Efficiency Wins –** Platforms routinely deflect 60–90 % of tickets and cut AHT, but revenue-linked ROI reporting is still emerging.
- **Sentiment & Escalation –** Detection and instant hand-off are table stakes; accuracy and context quality vary widely.
- **Rapid Roll-outs –** Low-code connectors and live data streams shorten multi-system deployments, reducing IT drag.
- **Next-Wave Features –** Generative and agentic AI ship almost monthly, with voice parity in sight.
- **Vendor Alignment –** Providers that pair fast innovation with continuous tuning and usage-aligned pricing map closest to current CX priorities— security, clarity, and measurable revenue impact.

Methodology

VOX runs daily preference pulses to capture the voice of retail and eCommerce CX Directors and VPs. Each leader provides their voice measured by the level of importance across multiple markets. Those signals roll into a proprietary 0-100 VOX Score that updates in real time as new leader voice arrives.

In April 2025 we have identified strong voice signals in Conversational AI. Guided by that consensus, the research team distilled ten capability areas and framed twenty yes/no evaluation questions. VOX's AI agents reviewed the public documentations of twenty-four retail-focused CAI vendors. Vendors were reached out to fact-check the extracted evidence but could not influence the rubric or their inclusion.

The Landscape Map plots two dimensions for every platform: Preference-Coverage—the share of questions a vendor can credibly answer today—and its weighted VOX Score, which shows how closely those answers align with leaders' current needs. The map is a snapshot; our research team continuously monitors the preference pulse and will publish updated reports as priorities shift.
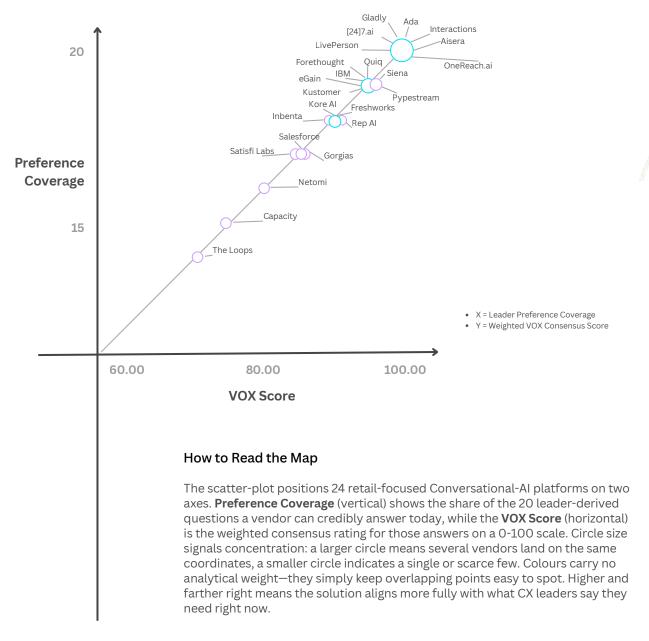
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VP, Customer Experience | Expertise: 1stDibs, Groupon, Shutterstock, J6 Labs, AOL

In a fragmented marketplace and a world where our time is so valuable, it's refreshing to witness a transformational business approach that seeks peer insights, vendor ranking and subject matter expertise with a frictionless application.

Vendor Map Snapshot
May 2025 CX Leader Preferences

Preference Coverage (vertical axis)
VOX Score (horizontal axis)

Vendors plotted: Gladly, Ada, Interactions, [24]7.ai, Aisera, LivePerson, OneReach.ai, Forethought, Quiq, Siena, IBM, eGain, Pypestream, Kustomer, Kore AI, Freshworks, Inbenta, Rep AI, Salesforce, Satisfi Labs, Gorgias, Netomi, Capacity, The Loops

- X = Leader Preference Coverage
- Y = Weighted VOX Consensus Score

How to Read the Map

The scatter-plot positions 24 retail-focused Conversational-AI platforms on two axes. **Preference Coverage** (vertical) shows the share of the 20 leader-derived questions a vendor can credibly answer today, while the **VOX Score** (horizontal) is the weighted consensus rating for those answers on a 0-100 scale. Circle size signals concentration: a larger circle means several vendors land on the same coordinates, a smaller circle indicates a single or scarce few. Colours carry no analytical weight—they simply keep overlapping points easy to spot. Higher and farther right means the solution aligns more fully with what CX leaders say they need right now.

What the Data Shows

Vendors cluster along a narrow diagonal line. A tight diagonal preference band emerges. Vendors in the **upper-right** satisfy nearly every high-priority requirement—privacy guardrails, real-time sentiment escalation, revenue attribution—and earn the highest consensus scores from leaders. A **mid-band** group covers many needs but falls short on the heaviest-weighted items, often transparency tooling or ROI analytics. Points lower on either axis address fewer leader priorities or lack public proof, and the largest circles mark spots where multiple vendors share the same score. Because the map mirrors live preference data, positions can dynamically shift as leader preferences evolve over the next few weeks or months.

Market Trends & Guidance

AI is evolving at an unprecedented pace, yet the Conversational-AI landscape is still fragmented. Drawing on VOX's April data from retail and eCommerce CX leaders—and matching those findings to vendor documentation—this section highlights the ten capability areas that matter most right now. Each snapshot translates leader priorities into practical guidance, showing where the market already delivers and where meaningful gaps remain.
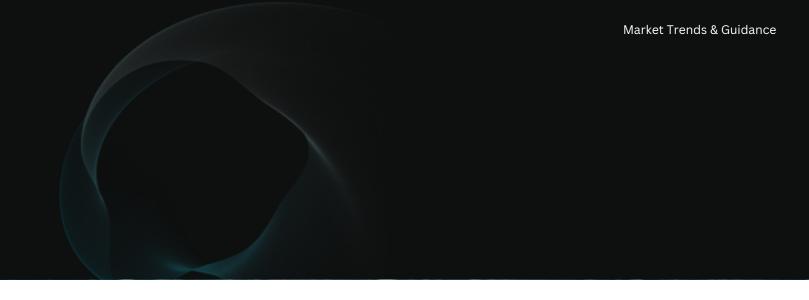
Regulatory & Compliance Alignment

Across the CAI market, vendors have largely internalized data-privacy mandates but are still uneven on transparency. Nearly every platform now advertises GDPR/CCPA readiness—offering encryption, data-retention controls, and "right-to-be-forgotten" APIs—and most will sign SOC 2 or HIPAA agreements on request. Deletion workflows, audit trails, and PII-redaction are increasingly table stakes, reflecting steady pressure from privacy legislation and enterprise security teams.

Customer-facing **AI-identity disclosures, however, remain more ad-hoc.** Roughly half of the vendors ship an out-of-the-box disclaimer or bot-label; the rest simply allow brands to add a custom greeting or UI tag. In practice, transparency still depends on the implementer's diligence rather than hard-wired product design. The direction of travel is clear—regulators and buyers alike are pushing for default "AI in use" notices—but today the industry shows a maturity gap: **strong back-end compliance tooling, but front-end disclosure is often left to configuration and best-practice guides.**

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Two gaps remain: a handful of vendors have no native detector (they surface only basic thumbs-up/down data), and accuracy still varies by language or channel —**highlighting the need for brand-level tuning**.

Consumer Trust & Frustration

Real-time "emotion sensing" has become a near-universal checkbox: most CAI platforms now embed sentiment analytics that watch for angry tone, repeated fallback loops, or low NLU confidence and flag them instantly. Leading systems turn more than 30 micro-signals (caps-lock, punctuation, intent mismatch, CSAT taps) into a rolling "frustration score," while a minority still rely on post-chat surveys or manual dashboards. Two gaps remain: a handful of vendors have no native detector (they surface only basic thumbs-up/down data), and accuracy still varies by language or channel—highlighting the need for brand-level tuning.

On the recovery side, **seamless AI-to-human handoff is now table stakes**. Almost every platform lets you define triggers (negative sentiment, user typing "agent," SLA breaches) and passes full context to a live rep so customers never repeat themselves. Differentiators are shifting to how proactive the handoff is—some solutions pre-warm agents with autogenerated summaries or invite a live "co-pilot" before the user even asks. The takeaway for CX leaders: sentiment detection is broadly available, but you'll still need to calibrate thresholds and escalation flows to your brand's tone and tolerance for risk.

Efficiency & ROI

Nearly every CAI vendor now quantifies its value in hard contact-center KPIs: dashboards report self-service deflection, average-handle-time cuts, and first-contact-resolution rates—often down to channel, intent, or SKU. Case-study claims of 60-90 % ticket deflection or double-digit AHT reductions are common, but depth of measurement still varies. Leaders expose real-time containment and cost-savings views managers can slice by journey; laggards rely on quarterly exports or marketing anecdotes. Before committing, **CX teams should validate that a platform can attribute AI results to discrete conversations and benchmark them against human baselines in the same UI.**
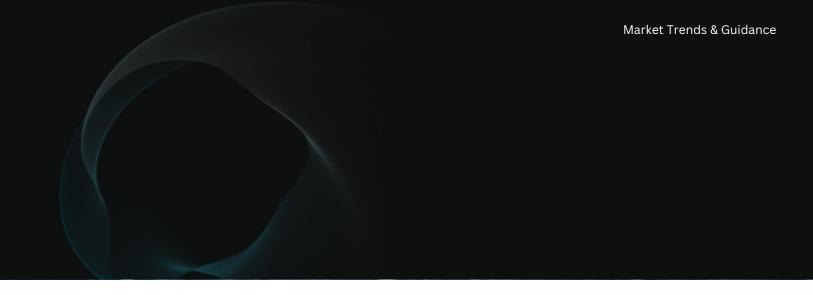
On the live-agent side, **AI "co-pilots" have shifted from nice-to-have to baseline.** Most vendors embed assistive LLMs that surface knowledge, draft replies, or auto-summarize context inside the agent console, trimming ramp time and further shrinking AHT. The competitive frontier is moving toward richer workflow automation—one-click actions, proactive next-best steps, and real-time sentiment tips—while a small minority still offer only canned responses or rely on third-party plug-ins. For buyers, the litmus test is how seamlessly the assist layer plugs into existing CRMs and whether it learns from your own data rather than generic corpora, because that's where the sustained ROI lies.

Implementation & Integration Realities

Across the CAI market, integration is no longer a bespoke project but an "out-of-the-box plus API" expectation. Most platforms publish detailed implementation guides and ship sizable connector libraries—often counted in the dozens or even hundreds—covering mainstream CRMs, eCommerce engines, ticketing tools, and data warehouses. These libraries sit on top of open REST interfaces and low-code integration layers, allowing teams to plug legacy or multi-system environments into the assistant without heavy custom code. Where gaps remain, vendors typically offer solution-engineering support or configurable HTTP hooks to extend coverage, though a small subset of tools remain confined to a single commerce stack and will require extra effort to fit broader ecosystems.

Near-real-time data flow has likewise become table stakes. The prevailing pattern is to stream order events, profile updates, and CDP signals through webhooks or event buses so that both bots and human agents work from the same, current record. **Platforms still relying on periodic batch sync risk stale recommendations and disjointed hand-offs**—an important due-diligence point for CX leaders aiming for true omnichannel personalization.

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Data Security & Privacy

Storing conversation transcripts is standard across CAI, but nearly every vendor now couples that retention with **granular role-based access control (RBAC)**, backed by **SOC 2-style governance and end-to-end encryption.** Admins can typically decide who may view, export, redact, or delete specific chats, while a privacy-first minority simply **purges personal data at session close,** sidestepping access-control complexity. Buyers should verify both the depth of RBAC and default retention periods to ensure they match corporate risk posture.

Auditability has likewise matured: most platforms keep **complete, timestamped logs of prompts, responses, confidence scores, and edits** and surface them through dashboards or exportable trails. Extra safeguards— **automatic PII redaction, "hallucination" filters, auto-QA scoring, and trust layers that block off-brand output before it reaches customers**—are increasingly built in. The headline: comprehensive audit and compliance tooling is broadly available, but sophistication varies, so leaders should test whether a platform's logs, redaction options, and safety checks meet both internal governance standards and external regulatory demands.

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Improving Self-Service & Deflection

End-to-end automation has become the norm: most CAI platforms now **resolve routine tasks such as order-tracking, returns, password resets, and even refunds entirely on their own**, plugging directly into commerce and CRM systems to take real actions—not just surface information. Reported figures show bots routinely **deflect 60 – 90 % of incoming tickets,** freeing human agents to focus on complex or high-value conversations. A small fringe still relies on decision trees or partial flows, so leaders should verify whether the assistant can complete the workflow (e.g., generate an RMA, issue a refund) rather than merely hand off.

Revenue-side capabilities are catching up. A clear majority of vendors can now **leverage purchase history and preference data to offer dynamic, hyper-relevant product recommendations inside the chat**, turning self-service into a personalized shopping assistant. Where those data pipes are absent, recommendations default to static FAQs or catalog look-ups, limiting upsell potential. CX teams should confirm that the bot can access real-time customer context—and that guardrails exist to keep suggestions on-brand—to unlock both cost savings and incremental revenue from automated conversations.

Measurement & Reporting

Tying conversations to revenue is the new frontier. A growing tier of vendors can now attribute AI chats to eCommerce outcomes such as AOV lifts, upsell / cross-sell conversions, or reduced cart abandonment.

Real-time, self-service analytics have become the baseline: almost every CAI platform ships **live dashboards for core bot KPIs—containment vs. fallback rates, resolution speed, sentiment / CSAT, and escalation volumes—updated second-by-second**. Filters by channel, intent, or time window let CX teams spot issues and retune flows without waiting for end-of-day exports. Where platforms differ is in depth: advanced suites surface trend alerts, conversation-level drill-downs, or auto-QA scoring, while leaner tools stop at high-level charts.

Tying those conversations to revenue is the new frontier. A growing tier of vendors can now **attribute AI chats to eCommerce outcomes such as AOV lifts, upsell / cross-sell conversions, or reduced cart abandonment**, pulling purchase events straight from commerce or CDP feeds. Others still focus on service metrics only—leaving finance teams to splice bot logs with storefront analytics in a separate BI stack. When short-listing, leaders should confirm whether the platform delivers built-in **AI revenue attribution** or merely supplies the raw conversation data needed for external analysis.

The momentum is clear: vendors are rapidly weaving Generative LLMs, multi-agent orchestration, and voice-first experiences into their stacks.
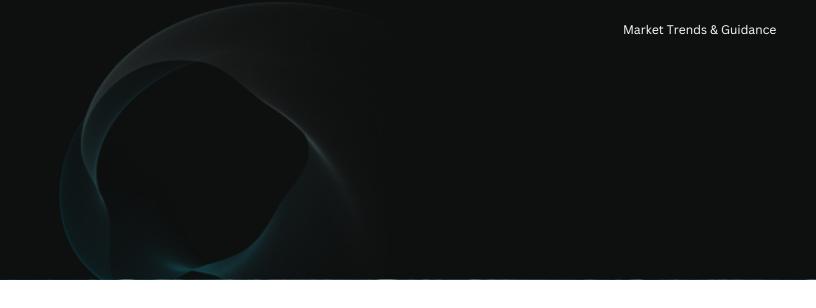
Roadmap & Future Innovations

The momentum is clear: vendors are rapidly weaving **Generative LLMs**, multi-agent orchestration, and **voice-first experiences** into their stacks. What began as FAQ bots is becoming **agentic AI that interprets intent, plans multi-step actions, and completes transactions end-to-end**—across chat, email, and phone. Release cadences have tightened to weekly or monthly, and many providers now present their bot as a "digital coworker" that generates on-brand prose and personalizes upsell offers in real time. Voice is the next frontier; several platforms already reuse the same LLM logic for spoken requests, enabling zero-hold "voice commerce" and dissolving the boundary between IVR and messaging.

To keep this sophistication on-brand, nearly every solution includes **continuous learning & optimization**: auto-captured unknown intents, human-in-the-loop review tools, and success teams that retrain models whenever products, policies, or compliance rules change. A smaller set still relies on ad-hoc tuning, so CX leaders should verify how often models refresh, which guardrails (e.g., hallucination filters, safe-prompt layers) are in place, and whether updates require engineering effort or arrive through low-code configuration.

Engagement Model & Support

Most providers now pair their technology with **ongoing, high-touch success programs**—dedicated CSMs, periodic strategy reviews, and expert training that keep the bot aligned with **new product lines, peak-season volumes, and evolving compliance rules**. Whether offered in-house or through certified partners, these services typically include continuous intent tuning, workflow updates, and agent up-skilling rather than a one-time launch. A minority still operate on a largely self-serve model, so buyers should confirm how much hands-on help (and at what cost) they can expect as business needs shift.

Reliability commitments have likewise matured: platforms commonly sign **enterprise-grade SLAs—99.8–99.99 % uptime, 24 × 7 critical support, and defined response-time targets**—that cover the AI layer as well as the core cloud service. Some even tie fees to outcome or ROI guarantees, while a few leave specific performance clauses buried in custom contracts or omit them entirely. CX leaders should push for an SLA that explicitly addresses AI interaction speed, availability, and rapid escalation paths to ensure automated conversations remain dependable when it matters most.

Pricing & Total Cost of Ownership

The market is **shifting toward usage- or outcome-based pricing**—think **per-conversation, per-resolution, or pay-for-success** models that flex automatically with seasonal peaks and slow periods. This turns the bot into a true variable cost: higher chat volumes in November simply raise the bill in a predictable way, while quieter months cost less, with **no surprise overage fees** hidden in the fine print. Some vendors even peg fees to provable ROI (e.g., a guaranteed 5× return), aligning their incentives with yours. Seat-license plans still exist, but they're increasingly paired with low, transparent usage add-ons so brands don't over-provision year-round.

Up-front cost visibility has improved as well. Leading proposals spell out **exact implementation, professional-service, and expansion fees**—one-time setup, optional training blocks, new-channel add-ons—so finance teams can forecast TCO with confidence. A few providers remain less forthcoming, relying on **custom quotes that reveal full costs only late in negotiations**. When short-listing, insist on a complete rate card from day one and verify that future volume spikes will scale within that agreed pricing band rather than triggering unexpected charges.

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Check your preferred vendor's ranking

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Vendor Deep Dive

⊙→ Forethought

VOX Score	94.78 / 100
Coverage	19 / 20 questions "Yes"
HQ	San Francisco, CA
Website	www.forethought.ai

👥 Talk to Forethought: deon@forethought.ai

📞 <u>Ask VOX for Introduction</u>

May 2025 CX-Leader Preference Map for Forethought

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Forethought provides automated disclosures that clearly inform customers when they are interacting with an AI agent. These disclosures can be customized to match your brand voice and appear at the start of the interaction. This ensures transparency and helps set the right expectations with your customers from the first touchpoint.	https://forethought.ai/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Forethought supports key compliance requirements like GDPR and CCPA. We offer data encryption, access controls, the right to be forgotten, and customizable consent messaging for AI interactions. Our team also works closely with customers to align with their internal security and privacy policies.	https://forethought.ai/ https://support.forethought.ai/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Forethought tracks user frustration in real time through sentiment analysis, behavioral cues, and live feedback like CSAT and thumbs up/down ratings. The AI can adjust its approach or escalate to a human when needed, and all signals are captured in reporting to help improve performance over time.	https://forethought.ai/ https://support.forethought.ai/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Forethought seamlessly hands off to a live agent based on signals like frustration, intent, or direct request. Handoffs are automatic, follow configurable rules, and preserve full context across chat, email, and voice to ensure smooth transitions and faster resolutions.	https://support.forethought.ai/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Forethought provides metrics on key outcomes like deflection rates, average handle time reduction, and first-contact resolution at both the AI and human agent level. These insights are available in our analytics dashboard and can be segmented by channel, topic, or timeframe.	https://support.forethought.ai/ https://forethought.ai/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Forethought includes AI-driven Agent Assist features like suggested responses, real-time knowledge lookups, and workflow recommendations to help agents work faster and more accurately. It also summarizes tickets and includes an AI chat assistant, all delivered through a browser extension that overlays directly into the agent's helpdesk.	https://forethought.ai/

May 2025 CX-Leader Preference Map for Forethought

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Forethought has a documented approach and best practices for handling complex integrations with legacy systems, multiple CRMs, and eCommerce platforms. Our solutions engineering team works closely with customers to ensure smooth implementation based on their specific tech stack and business needs.	https://forethought.ai/ https://forethought.ai/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Forethought integrates in near real-time with major eCommerce, CRM, and CDP platforms to unify customer data and enable more personalized AI interactions.	https://forethought.ai/ https://forethought.ai/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Forethought stores customer conversation data like transcripts and relevant metadata. We offer role-based access controls so only authorized team members can view or manage this information, based on their user permissions.	https://forethought.ai/ https://www.g2.com/products/forethought-ai/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Forethought provides built-in tools for auditing AI interactions, including conversation history, confidence scores, and decision logs. These help teams review performance, ensure compliance, and make informed adjustments.	https://forethought.ai/ https://forethought.ai/pricing/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Forethought fully automates common inquiries like order status, returns, and product recommendations to reduce live agent workload. We also handle more complex inquiries using Autoflows, which are agentic AI workflows that allow the AI to take action and resolve issues end-to-end.	https://forethought.ai/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Forethought can dynamically personalize product recommendations using data like purchase history or customer preferences to encourage effective self-service. This capability was recently released as part of our ongoing AI enhancement efforts.	https://forethought.ai/

May 2025 CX-Leader Preference Map for Forethought

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Forethought offers real-time reporting and dashboards to track key Conversational AI metrics like satisfaction scores, fallback rates, deflection, and resolution rates. While we don't track cart abandonment, our insights help teams monitor performance and optimize the customer experience.	https://forethought.ai/ https://forethought.ai/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	This functionality is coming soon. By the end of Q2, Forethought will offer the ability to track custom metrics such as Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI. A screenshot of the design is in column F	https://forethought.ai/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Forethought is actively developing next-gen Conversational and agentic AI features. We release new features weekly and have an ambitious product roadmap to stay at the forefront of agentic AI for customer support.	https://www.businesswire.com/ https://www.businesswire.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Forethought provides ongoing model training and optimization to keep both standard and agentic AI aligned with brand updates, product changes, and compliance requirements. Our team works closely with customers to ensure the AI stays accurate and up to date.	https://forethought.ai/ https://forethought.ai/

May 2025 CX-Leader Preference Map for Forethought

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Forethought offers continuous professional services, training, and consulting to help adapt the AI solution as your business evolves. This includes support for new lines of business, seasonal changes, and shifting priorities. We also offer an Ask the Expert service, where customers can meet with a Solutions Engineer for advanced guidance and learning.	https://forethought.ai/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Forethought provides reliable SLAs for system uptime, support responsiveness, and performance related to AI-driven customer interactions. These SLAs are designed to meet enterprise standards and ensure consistent, dependable performance.	https://support.forethought.ai/

10. Pricing & Total Cost of Ownership (TCO)	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Forethought uses a usage-based pricing model that scales with volume. Pricing is a blend of platform fee plus a committed usage cost based on expected ticket/deflection volume. • They openly discuss overage charges if usage exceeds the plan, so there are no surprise fees – additional usage costs are disclosed and can be planned for with the sales team. • This provides flexibility for fluctuating demand.	https://forethought.ai/ https://forethought.ai/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Forethought clearly delineates which features are add-ons versus included. For example, adding a new channel like Slack or advanced security/support is marked as an "Add-On" in their pricing plans. This transparency in the feature list and pricing FAQ indicates that any extra implementation or expansion costs are communicated upfront in proposals.	https://forethought.ai/ https://forethought.ai/

Vendor Deep Dive

The Loops

VOX Score	70.22 / 100
Coverage	14 / 20 questions "Yes"
HQ	San Mateo, CA
Website	www.theloops.io

Talk to The Loops: www.theloops.io

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for The Loops

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	TheLoops' documentation does not indicate any built-in feature that automatically tells users they are talking to an AI. The Autopilot bot emphasizes seamless handoffs and real-time status transparency, but no mention of an AI identity disclosure is made.	https://theloops.io/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	No	Apart from general enterprise security and privacy practices, there is no evidence of specialized features for AI conversation compliance. TheLoops highlights robust data security and access controls, but it does not detail capabilities like GDPR "right to be forgotten" or explicit user consent for bot chats.	https://theloops.io/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	TheLoops platform monitors customer sentiment in real time to flag frustration. It analyzes 37+ sentiment signals during conversations, generating instant sentiment scores so teams can identify unhappy customers early.	https://theloops.io/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	TheLoops Autopilot bot includes seamless agent handoff when it cannot resolve an issue or the user needs a human. It will automatically create a ticket and transfer full context to a human agent, ensuring a smooth transition without user frustration.	https://theloops.io/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	TheLoops provides analytics showing the AI's impact on support KPIs. For example, after deploying TheLoops, ticket volume dropped from 15% to 11% (indicating deflection) and a customer achieved $400K in support cost savings. These metrics demonstrate ROI improvements from the AI.	https://theloops.io/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	TheLoops AI Agent Copilot acts as an agent-assist in real time. It provides next-step suggestions and contextual knowledge to agents within their workspace, auto-summarizes case history, and even generates draft replies or knowledge articles to help agents resolve issues faster.	https://theloops.io/ https://theloops.io/

May 2025 CX-Leader Preference Map for The Loops

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	TheLoops is built for easy integration into enterprise environments. It offers a library of 70+ no-code integrations (Salesforce, Zendesk, Jira, etc.), enabling quick connection to CRMs and other systems without custom development. Best practices are embedded in its connector framework.	https://theloops.io/platform/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Yes – TheLoops platform pulls in data from key systems in real time to personalize AI interactions. Its "Connected Intelligence" approach integrates with CRMs, CDPs, and other databases live, so the AI has current context (e.g. customer profiles, order info) for tailored responses.	https://theloops.io/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	TheLoops does retain conversation and customer data in its platform, and it enforces granular role-based access controls. The system supports setting fine-grained permissions on data (like user case data) per role, ensuring only authorized team members can view sensitive conversation records.	https://theloops.io/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	TheLoops includes an AutoQA (Auto Quality Assurance) module that continuously audits conversations (both bot and agent) for quality and compliance. It gives managers real-time insight into things like procedural compliance, tone, and empathy in interactions, acting as a built-in compliance check on AI-driven conversations.	https://www.businesswire.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	TheLoops Autopilot self-service bot can handle routine customer issues end-to-end. It's not a fixed decision tree – it uses historical resolutions and live data to answer questions, update or close tickets automatically, and only escalates to humans when needed. This deflects repetitive inquiries from reaching live agents.	http://theloops.io
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	No	TheLoops bot does personalize its responses based on customer data (like past interactions), but there is no indication of a feature for dynamic product recommendations or upselling. Its focus is on support issue resolution rather than marketing-driven product suggestion capabilities.	https://theloops.io/

May 2025 CX-Leader Preference Map for The Loops

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	TheLoops provides live dashboards and alerts for conversational AI performance. For instance, it computes a predicted CSAT (satisfaction) score in real time based on conversation sentiment. Managers can also monitor trends like escalating issues or sentiment drops instantly. (Metrics such as "fallback rates" or "cart abandonment" are not explicitly mentioned, but overall real-time CX Ops metrics are supported.)	https://theloops.io/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	TheLoops' analytics focus on support-centric outcomes rather than sales KPIs like AOV or upsell conversion. There's no documentation of tracking commerce metrics like revenue uplift. (It does help predict and reduce customer churn risk via sentiment analysis, but direct eCommerce KPI impact tracking isn't described as a feature.)	https://theloops.io/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	TheLoops is actively expanding its platform with next-gen AI. In late 2023 it introduced generative AI features into its core product – for example, the AI Copilot now provides AI-generated case summaries and personalized responses using advanced GenAI models. (Voice integration is not mentioned, but TheLoops clearly invests in cutting-edge conversational AI innovations.)	https://www.businesswire.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Yes. TheLoops AI continuously learns from each interaction to improve itself over time. The platform's machine learning models auto-adapt based on new tickets and feedback. Additionally, TheLoops' team works closely with customers to configure and update AI use-cases (ensuring the AI stays aligned with evolving business and compliance needs).	https://theloops.io/

May 2025 CX-Leader Preference Map for The Loops

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Customers report that TheLoops provides very hands-on support and collaboration. The TheLoops team works closely with clients to ensure they realize value and adapt use-cases to their needs. This suggests ongoing consulting and success services are part of the engagement, helping adjust the AI as the business changes.	https://theloops.io/pricing/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	TheLoops is an enterprise-grade platform and emphasizes robust operations and security. While specific SLA terms aren't publicly posted, TheLoops is designed for reliability (undergoing external audits, etc.), and it offers the kind of uptime/support commitments that enterprise customers require (via its enterprise agreements).	https://theloops.io/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	No	TheLoops' pricing information is not fully transparent publicly. They advertise flexible, scalable plans, but details (like how seasonal volume surges are handled or any overage fees) are not disclosed on their website. Pricing typically requires discussion with their sales team.	https://theloops.io/pricing/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	No	No. The website does not publish specifics on implementation or add-on costs – it only outlines feature tiers and then asks to "Contact Us" for pricing. This indicates that details on setup or expansion fees are provided directly in sales proposals, not openly on the site.	https://theloops.io/pricing/

Vendor Deep Dive

→ Capacity

VOX Score	74.50 / 100
Coverage	15 / 20 questions "Yes"
HQ	Saint Louis, MO
Website	www.capacity.com

Talk to Capacity: www.capacity.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Capacity

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	We found no public information indicating that Capacity's chatbots automatically disclose their AI nature to end-users. The official docs and ethical guidelines do not mention any built-in notification to customers that they are interacting with an AI agent (no evidence of such feature was found).	
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Capacity meets major compliance standards (e.g. GDPR, CCPA, HIPAA, SOC 2) for data privacy and security (Security - Capacity) (Security - Capacity). This implies support for requirements like data handling policies and honoring data deletion requests (the "right to be forgotten"). For example, the platform is explicitly GDPR compliant and keeps customer data private (never used to train external models) (Security - Capacity), which aligns with strict regulatory requirements.	

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	The platform can detect user sentiment and frustration signals in real time. Capacity's Conversational AI "listens for tone and words to figure out how someone feels, then adjusts its responses to be more helpful and human". This sentiment analysis capability allows the system to recognize if a user is unhappy or getting frustrated and respond appropriately. https://capacity.com/conversational-ai-software/	https://capacity.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Capacity supports seamless escalation from the bot to human agents. The platform "enables graceful human handoffs" during conversations. In practice, if the AI cannot help or the user prefers a human, the conversation can be transferred to a live agent along with context. (Capacity advises configuring criteria for escalation and handoff processes to ensure smooth transitions.	https://capacity.com/ https://capacity.com/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Capacity provides analytics on key support metrics attributable to the AI. Its dashboard reports deflection rates (how many inquiries were handled by AI vs. needing an agent) as well as engagement stats like total inquiries, session durations, etc. It also tracks resolution speed and "containment" metrics (inquiries resolved without human help). These metrics help quantify reduced handle times and increased first-contact resolution due to the AI.	https://capacity.com/analytics
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	The platform includes AI-driven Agent Assist features to boost live agents' productivity. In live support mode, Capacity offers real-time AI suggestions, recommended answers, and instant knowledge base lookups for agents. Agents receive live coaching prompts and can see AI-suggested responses during conversations, enabling faster, more consistent customer service with AI backup.	https://capacity.com/

May 2025 CX-Leader Preference Map for Capacity

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Capacity has a robust approach for integrating with enterprise systems. It comes with 250+ pre-built integrations and an open developer platform. Official docs highlight syncing with popular CRMs (Salesforce, Zendesk, etc.) and even custom APIs for legacy or unique systems. Additionally, Capacity emphasizes data integration best practices (e.g. consolidating data from legacy silos before AI implementation), indicating a documented strategy for complex integration scenarios.	https://capacity.com/security-2 https://capacity.com/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	The platform integrates in near real-time with major business systems to unify customer data. Capacity connects to CRM, helpdesk, ecommerce, and other applications via its pre-built integrations and APIs. This allows the AI to draw on up-to-date customer info (orders, account details, etc.) during conversations. For instance, Capacity's retail solution ties into eCommerce backends so the virtual agent can access order statuses or loyalty data on the fly, ensuring personalized interactions across channels.	https://capacity.com/security-2/ https://capacity.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Capacity does store conversation and user data, and it provides granular, role-based access controls to protect that data. The platform touts role-based access control features that "restrict sensitive data" visibility to authorized team members. All customer interactions are fully encrypted at rest and in transit. These measures ensure that chat transcripts or personal info collected by the AI are secured and only accessible to appropriate roles.	https://capacity.com/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Capacity includes tools for auditing AI interactions and ensuring compliance. The system offers audit logs that track who accessed or modified data and when, supporting compliance oversight. Moreover, Capacity has AI-powered Quality Monitoring capabilities: it uses analytics, speech recognition, and sentiment analysis to automatically score and evaluate interactions. This means conversations can be reviewed for quality and compliance with standards. Together, these features allow organizations to audit bot-driven conversations and maintain compliance records.	https://capacity.com/security-2/ https://capacity.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	The AI can fully automate common inquiries (order status, returns, FAQs, etc.), greatly reducing live agent workload. According to Capacity, its virtual agents can "automate 90% of customer inquiries" across channels. In a retail context, the bot handles tasks like order tracking, return requests, and follow-up messages 24/7 without human intervention. This offloads the bulk of routine questions from agents and allows customers to self-serve for most common issues.	https://capacity.com/ https://capacity.com
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	The Capacity bot is capable of dynamic, personalized product recommendations using customer data. Backed by machine learning, it "instantly sees and understands a customer's history" and can "make tailored recommendations" in its responses. In other words, the AI learns from past interactions and purchase history to suggest relevant products or content to the user. This personalization is designed to mimic a human agent's ability to cross-sell/upsell based on customer preferences, thereby encouraging self-service and higher engagement.	https://capacity.com/ https://capacity.com/

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May 2025 CX-Leader Preference Map for Capacity

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Capacity offers real-time reporting dashboards for its conversational AI. The Insights & Analytics module provides live metrics on user interactions and bot performance. For example, admins can monitor satisfaction signals via user feedback (thumbs-up/down ratings) and track fallback/containment rates in real time. In an eCommerce scenario, Capacity's analytics also surface business outcomes like conversion rates and customer behavior changes, allowing you to see impacts such as any shift in cart abandonment or sales after deploying the AI.	https://capacity.com/analytics/ https://capacity.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	Capacity's analytics can tie AI interactions to certain eCommerce KPIs, particularly conversion metrics. The platform explicitly notes that it tracks conversion rates and support efficiency as part of its real-time insights. This means you can measure, for example, how many AI chat interactions lead to purchases or upsells. However, we did not find public references to specific metrics like Average Order Value or churn rates being reported by Capacity. (The focus is on conversion and containment metrics; any AOV or churn analysis would likely be custom-derived rather than a built-in metric.)	https://capacity.com/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Capacity is actively developing next-gen conversational AI features, including generative AI and advanced voice capabilities. The platform "uses both conversational and generative AI" to power its interactions, indicating that it can produce dynamic, human-like responses (not just pre-scripted answers). It also supports voice integration: Capacity's AI can handle voice channels with speech recognition and even allows creation of custom branded AI voices. These innovations show that Capacity is leveraging the latest AI tech (LLMs, voice assistants, etc.) and moving toward more "agentic" AI behavior where the AI can autonomously carry out complex tasks via its workflow automation suite.	https://capacity.com/ https://capacity.com/ https://capacity.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	The platform provides ongoing model optimization and can be kept up-to-date as things change. Capacity's AI has a built-in feedback loop – every answer it gives can receive thumbs-up/down feedback from users, which is fed into its learning algorithms to "improve responses over time." This continuous learning keeps the AI's knowledge fresh. Furthermore, Capacity stresses the importance of expert guidance during and after implementation. In practice, the company offers to work closely with clients (through its customer success team or professional services) to retrain or tune the AI when there are new product lines, updated policies, or compliance changes, ensuring the bot's knowledge and behavior stay current.	https://capacity.com/ https://capacity.com/

May 2025 CX-Leader Preference Map for Capacity

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Capacity offers ongoing professional services and training to adapt the solution as your business evolves. They have a "top notch" customer success and support team (as noted by user reviews) and a variety of training options available. Training can be delivered in-person, live online, via documentation and videos, etc. This indicates you will receive continuous enablement. Moreover, Capacity provides 24/7 support and consulting, so as you launch new use cases or face peak seasons, their team can help adjust your AI knowledge base, create new conversation flows, and ensure the system scales with your needs.	https://www.capterra.com/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	No	We found no publicly available SLA details for uptime or performance guarantees. While Capacity does have an uptime Status page and it undoubtedly operates in a high-availability cloud (given its enterprise clientele), specific SLA commitments (e.g. 99.9% uptime or response time guarantees) are not published on their website. On the plus side, they do provide 24/7 live support for customers, which speaks to strong support responsiveness. However, any formal uptime/performance SLAs would likely be detailed in contractual documents rather than public documentation, and we did not find those figures in our research.	

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	No	Capacity's pricing information is not transparently published, and flexibility for volume spikes isn't evident from public sources. Reviews suggest that the platform has limited pricing options, which implies a more rigid pricing structure. We did not find any mention of special accommodations for seasonal surges or usage-based plans in their documentation. In practice, pricing seems to be handled via custom quotes, and there's no clear evidence of "surge-friendly" pricing or of hidden fees (beyond the absence of public detail). In short, pricing is not openly disclosed enough to assess flexibility.	https://www.smbguide.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	No	There is no public information detailing how Capacity presents implementation fees, professional service costs, or expansion charges in their proposals. The company's website and profiles do not outline cost breakdowns. Any such details would likely come out during the sales process. Given the lack of published info, we cannot confirm that these costs are clearly disclosed up front. (In user feedback and third-party rundowns we reviewed, no specific concerns about hidden implementation or add-on costs were noted, but also no confirmation of transparency was found.)	

Vendor Deep Dive

→ Satisfi Labs

VOX Score	84.64 / 100
Coverage	17 / 20 questions "Yes"
HQ	Tampa FL
Website	www.satisfilabs.com

Talk to Satisfi Labs: www.satisfilabs.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Satisfi Labs

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Satisfi's chat experience clearly identifies itself as an AI assistant. Clients can configure welcome messages and chatbot persona elements to set user expectations. Satisfi also offers a Consent Form feature that requires users to accept terms before starting an AI chat, which inherently informs them they're engaging with an AI (not a human).	https://satisfilabs.com/ https://docs.satisfilabs.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Satisfi Labs is built for enterprise-grade compliance. The company is GDPR compliant (ensuring lawful, transparent data processing). It also provides tools like a pre-chat Consent Form to capture user consent before AI interactions. The platform emphasizes data privacy and security (e.g., SOC 2 certification, not storing payment data) and allows clients to meet requirements like data deletion through its privacy measures.	https://satisfilabs.com/ https://satisfilabs.com/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	No	We found no indication of a real-time sentiment analysis or frustration detector in Satisfi's documentation. The platform does collect user feedback (e.g., thumbs-up/down ratings or CSAT survey results after chats) as part of its analytics, and it applies moderation filters to flag inappropriate language. However, it doesn't explicitly mention dynamic sentiment monitoring or automatic frustration alerts during live conversations.	https://satisfilabs.com/ https://docs.satisfilabs.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Satisfi's Live Agent Engine enables seamless AI-to-human handoffs. Users can escalate to a human agent at any time (for example, by selecting an option to "connect to an agent"). The AI + human workspace is designed to transition conversations smoothly, letting live staff handle complex issues. The system supports routing rules (e.g., assign chats to different teams like sales or support) to ensure the right agents receive the transfer.	https://satisfilabs.com/ https://docs.satisfilabs.com/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Satisfi Labs includes in-depth analytics to quantify AI impact. In the dashboard, clients can see the percentage of conversations handled entirely by AI (i.e. deflected from live agents). It even calculates "Work Hours Saved," estimating time saved by AI resolving queries without human intervention. Additionally, the live chat module tracks agent performance metrics (e.g., conversation counts, response and resolution times) to measure efficiency gains.	docs.satisfilabs.com docs.satisfilabs.com docs.satisfilabs.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	No	Satisfi's platform does not currently highlight an AI co-pilot for live agents. Its focus is on either automated AI responses or full handoff to human agents. Agents using Satisfi's Bridge Live Chat console can utilize productivity tools like saved Canned Responses and macros, but there is no mention of an AI that suggests replies or performs real-time knowledge lookups on the agent's behalf.	docs.satisfilabs.com

May 2025 CX-Leader Preference Map for Satisfi Labs

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Satisfi Labs provides integration APIs and has documented connectors for many systems. Its guides cover how to feed data into the AI (via Data Resources API endpoints for custom data). The platform offers out-of-the-box integrations with popular CRM and CMS platforms (e.g., Salesforce, Microsoft Dynamics, Simpleview), and even recommends using Zapier for quick integration with additional systems and workflows.	docs.satisfilabs.com satisfilabs.com satisfilabs.com
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Satisfi Labs' platform can connect to key enterprise systems in real time. For example, it supports direct integration with CRM systems like Salesforce and Dynamics to pull in customer data. It also integrates with eCommerce and ticketing platforms (e.g., Shopify, Ticketmaster, SeatGeek) via its Marketing Engine, ensuring the AI has access to the latest customer and product information. This enables more personalized interactions based on unified data.	satisfilabs.com satisfilabs.com

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Satisfi Labs stores chat transcripts and user data securely for clients. Conversation histories can be reviewed or exported via the admin dashboard. The platform includes role-based access management: administrators can assign users roles (e.g., limiting who can view data or analytics). Only authorized team members can access sensitive records, as the system supports account-level user roles and even allows restricting analytics access per user.	docs.satisfilabs.com docs.satisfilabs.com docs.satisfilabs.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Satisfi Labs has features to monitor and govern AI interactions. Notably, it employs Advanced Moderation layers – the system automatically flags or filters sensitive topics and any off-brand or offensive AI content. It also provides Security Alerts that instantly notify admins if a conversation contains potential safety or compliance issues (e.g., a user making a threat). These tools help clients audit chats and ensure the AI stays within approved guidelines.	satisfilabs.com satisfilabs.com

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Automating FAQs and routine inquiries is a core strength of Satisfi's AI. Clients report that the AI Agent Engine handles high volumes of everyday questions, freeing staff from repetitive Q&A. For instance, Satisfi's generative AI chat was deployed by ticketing firm AXS to instantly answer common questions like ticket transfers, which immediately reduced wait times and let human agents focus on complex issues. Similarly, in retail/eCommerce contexts, the bot can address order tracking, returns policy queries, etc., without human intervention.	satisfilabs.com solutions.axs.com
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	No	Satisfi's chat platform delivers relevant answers and can guide users to products, but it does not advertise personalized product recommendations based on individual user data. The AI will respond to product queries with on-brand information and can provide quick-option prompts (for example, a "Buy Now" button or a link to a product page). However, there's no indication that it leverages a specific user's purchase history or profile in real time to alter recommendations, beyond whatever context the user provides in the question.	satisfilabs.com

May 2025 CX-Leader Preference Map for Satisfi Labs

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Satisfi Labs provides live dashboards and extensive reporting for its conversational AI. The AI Chat Performance Dashboard shows usage metrics like total messages, unique users, and conversation volumes, and highlights what percentage of conversations were resolved by AI alone vs. needing live help. It also includes outcome metrics like "Work Hours Saved" by AI. The system tracks unsuccessful queries (for tuning) and captures customer satisfaction signals (e.g., CSAT feedback entries are logged) to gauge user sentiment.	docs.satisfilabs.com docs.satisfilabs.com docs.satisfilabs.com
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Satisfi's platform can report on eCommerce performance metrics when integrated with a store. In fact, the system's FactCubes commerce analytics will display key sales stats such as Total Orders, Total Sales, Average Order Value, and conversion rates (visitor-to-order). This means clients can monitor if AI-driven engagements correlate with higher AOV or conversion lift. (Metrics like churn rate aren't explicitly mentioned, but the toolkit focusing on retention and satisfaction suggests churn reduction can be inferred via repeat engagement data.)	docs.satisfilabs.com

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Satisfi Labs has embraced next-gen AI advancements. Notably, in 2023 it launched a generative AI capability (patent-pending Context LLM Response System) that integrates large language model tech for answer generation. This allows the bot to craft responses using LLMs while maintaining on-brand accuracy. The platform also supports emerging features like multi-language AI (60+ languages) and ongoing improvements in AI dialogue. (Voice integration is not a core offering currently; Satisfi's conversational AI is mainly delivered via chat on web, mobile, and messaging channels.)	solutions.axs.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Satisfi Labs' solution continuously learns and is supported by ongoing optimization. The AI Agent Engine benefits from a network learning effect – it's trained on millions of past queries across all clients, so it gets smarter over time automatically. For brand-specific updates, clients can easily update the AI's knowledge by adding new source content (e.g. website pages, FAQs) – the platform is designed to quickly incorporate such changes without lengthy re-training. Moreover, Satisfi's client success team provides regular reviews and training adjustments (ensuring the AI stays up-to-date with new products, policies, and compliance requirements as they arise).	satisfilabs.com satisfilabs.com

May 2025 CX-Leader Preference Map for Satisfi Labs

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Satisfi Labs works closely with its clients to ensure the AI keeps pace with business changes. They provide dedicated account managers for ongoing support. During onboarding and beyond, Satisfi's team helps configure the system (an onboarding specialist supplies the chat setup and guidance). As new content or seasonal needs arise, Satisfi offers services like periodic strategy reviews, training sessions, and consulting to optimize the chatbot for new use cases or campaigns. Clients view Satisfi as a long-term partner rather than a one-off vendor.	docs.satisfilabs.com docs.satisfilabs.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Satisfi Labs provides enterprise-grade reliability commitments. While exact SLA figures (e.g. 99.xx% uptime) are shared during contracting, the company emphasizes its long-term trusted partnership approach and adherence to industry standards, which entails high availability and responsive support. Satisfi's infrastructure and processes are SOC 2 compliant, indicating strong controls over uptime and data integrity. In practice, clients can expect formal SLAs for uptime and support (ensuring the AI service is consistently available and any issues are promptly addressed).	satisfilabs.com satisfilabs.com

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Satisfi Labs uses a flexible pricing model tailored to client usage, with no hidden fees noted. Many of its customers operate seasonal businesses (sports teams, attractions), and Satisfi is known to accommodate those fluctuations (e.g., scaling down costs in off-season). The company even provides a pricing calculator for its Marketing Engine module and has been praised for delivering an all-in-one solution at a "reasonable price" by clients. This suggests pricing is transparent and can scale with usage – a question Satisfi proactively addresses during the sales process.	satisfilabs.com satisfilabs.com
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Satisfi Labs is transparent in outlining all costs in its proposals. The company advises prospects to ask about scalability of pricing as needs grow, indicating they themselves clearly define how adding features or channels will affect cost. In practice, implementation fees, ongoing support services, and any optional add-ons are spelled out up front. Customers have expressed confidence that Satisfi's platform provides strong ROI for the price, with no surprises in the billing (as evidenced by feedback about the platform being a cost-effective all-in-one solution).	satisfilabs.com satisfilabs.com

Vendor Deep Dive

→ Gorgias

VOX Score	85.58 / 100
Coverage	17 / 20 questions "Yes"
HQ	San Francisco, CA
Website	www.gorgias.com

Talk to Gorgias: fraser.bruce@gorgias.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Gorgias

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	Gorgias's AI Agent does not automatically announce itself as a bot at conversation start. There is only an optional setting to notify the customer when handing the conversation over to a human agent, but no built-in disclosure that every message is from AI.	docs.gorgias.com
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Gorgias adheres to standard data protection and privacy regulations for all customer interactions (including AI). The platform is GDPR-compliant and SOC 2 certified, with tools to delete or anonymize customer data on request. (There is no special "consent for bot" prompt, but Gorgias meets industry norms for data handling and privacy.)	gorgias.com

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Gorgias's AI Agent can detect customer frustration. For example, it monitors conversation sentiment – if it "detects anger or frustration," it will trigger a handoff to a human. (This implies the system is actively analyzing messages for negative sentiment or repeated dissatisfaction.)	docs.gorgias.com
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	If a shopper explicitly asks for a human or the AI senses frustration/anger, Gorgias's AI Agent will automatically hand over the conversation to the support team. In practice, AI Agent "smartly hands over tickets" when it cannot fully help or when the customer requests an agent.	docs.gorgias.com

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Gorgias includes dedicated reporting to quantify AI impact. The Automate Overview dashboard shows the automation rate (i.e. deflected interactions) and time/cost saved. The Agent Performance report can filter AI Agent to see its effect on CSAT, first response time, and resolution time improvements. These give insight into how much workload the AI is offloading (e.g. ~60% ticket automation) and efficiency gains.	docs.gorgias.com docs.gorgias.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	No	Gorgias does not have a built-in generative reply suggestion or AI knowledge lookup for agents in the native product. (Some third-party apps in the Gorgias marketplace offer "AI co-pilot" functionality, but those are external integrations.) The platform's AI efforts are focused on the AI Agent that autonomously responds to customers, rather than assisting human agents in real time.	docs.gorgias.com

May 2025 CX-Leader Preference Map for Gorgias

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Gorgias provides a robust API and HTTP Integration feature for custom back-office systems. Documentation guides users to fetch or push data via REST API triggers for any third-party system. Out-of-the-box, Gorgias also integrates with 100+ apps (Shopify, Magento, CRMs like HubSpot, etc.), and offers tools (e.g. Pipedream, workflow builders) to connect additional or legacy systems.	
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Gorgias connects natively with major eCommerce platforms (especially Shopify) in real time. The AI Agent pulls live store data (order status, inventory, etc.) from Shopify and other tools to personalize answers and even perform actions. Gorgias also supports CRM/CDP integration – for example, you can plug in HubSpot via an HTTP integration to display lead/customer info inside Gorgias tickets. This ensures the AI has up-to-date customer context during conversations.	docs.gorgias.com docs.gorgias.com

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	No	Yes, all customer conversations are stored in Gorgias, but no, there isn't a granular restriction by role for viewing tickets. Any user with an agent role can search and view all tickets in the helpdesk. Gorgias has user roles (Admin, Agent, etc.) to control actions (like who can delete or export data), but it does not limit which tickets an agent can see – all transcripts are visible to the whole support team by design.	docs.gorgias.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Gorgias enables oversight of AI-driven conversations. All AI Agent conversations can be reviewed in a dedicated ticket view on the helpdesk. Moreover, an AutoQA feature uses AI to automatically review conversations and provide quality feedback. These tools let teams audit AI responses for accuracy, tone, and policy compliance, and make adjustments (the system even lets agents mark AI answers as correct/incorrect to improve future responses).	docs.gorgias.com gorgias.com

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Gorgias's AI Agent is specifically built to resolve frequent eCommerce questions end-to-end. It can instantly handle "Where is my order?" tracking queries, process order changes or cancellations, initiate returns/refunds, and even answer product FAQs or troubleshooting — all without agent intervention. (On average, merchants see the AI autonomously resolve about 60% of repetitive tickets.)	gorgias.com gorgias.com
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Gorgias is rolling out AI Agent for Sales capabilities that act like a virtual product expert. The AI can use the customer's context and catalog data to suggest relevant products. In fact, Gorgias notes the AI Agent engages in "personalized sales interactions, recommending products, answering questions, and guiding shoppers toward a purchase." During beta tests, this has led to tailored recommendations that increase conversion rates (reportedly 2.5× higher conversions).	

May 2025 CX-Leader Preference Map for Gorgias

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Gorgias's reporting suite includes live dashboards for AI metrics. Teams can monitor AI Agent's performance in real time via the Statistics section. For example, the Agent Performance report shows customer satisfaction scores and other KPIs filtered for the AI agent. The Automate Overview report provides the AI automation rate (versus human handoffs) and time saved, updated continuously. (Metrics like conversion uplift or cart abandonment due to AI are tracked in the new AI Sales report – see Q14.)	docs.gorgias.com docs.gorgias.com
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Gorgias is introducing analytics to tie AI chats to sales outcomes. In a closed beta "AI Agent Sales" report, merchants can see AI-influenced revenue (gross merchandise value) and conversion metrics. This includes tracking Average Order Value and conversion rate for customers who engaged with the AI, and even the effectiveness of AI's product recommendations or discount code usage. (Such reports let brands quantify upsells and sales driven by the AI assistant.)	docs.gorgias.com

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Gorgias is heavily investing in advanced AI. The current AI Agent uses a generative LLM to produce natural responses in 80+ languages and can autonomously perform actions (like canceling orders, modifying subscriptions) on the user's behalf. They continue to expand these capabilities – for example, the new Sales AI mode (in beta) shows ongoing innovation in agent-like AI for upselling. (Voice integration for phone calls is not available yet, but the platform's direction is clearly toward more "agentic" AI across channels.)	gorgias.com gorgias.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Gorgias's AI improves continuously through built-in mechanisms. The AI Agent leverages your latest help center content, product catalog, and custom guidance – so whenever you update policies or product info, the AI is instantly using the new data. Additionally, agents can "coach" the AI by giving feedback (thumbs-up/down on AI responses and suggesting better resources), which the system uses to refine future answers. This feedback loop and dynamic knowledge ingestion keep the AI's answers aligned with current brand information without requiring manual re-training from scratch.	docs.gorgias.com docs.gorgias.com

May 2025 CX-Leader Preference Map for Gorgias

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Gorgias provides ongoing customer success and training resources. They have a dedicated onboarding team and Customer Success Managers who remain engaged post-implementation. Through the Gorgias Academy e-learning, webinars, and an active support community, clients receive continuous guidance. For example, enterprise customers get Dedicated Implementation and Success partners to help configure workflows and optimize features over time. This ensures the AI and the overall platform can be tuned as your business or support needs change (such as prepping macros/AI for holiday peak season FAQs).	gorgias.com gorgias.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Gorgias offers enterprise-grade SLAs that cover its entire platform, including AI features. They commit to 99.9% server uptime, with 24/7 responsive support if any issues arise. The AI Agent operates within this same reliable infrastructure (it responds in real-time, typically under a second). While there isn't a separate "AI accuracy" guarantee (AI performance is best-effort), the uptime and support responsiveness for the system handling AI conversations are contractually assured.	gorgias.com

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Gorgias pricing is usage-based with clear terms. All plans include a monthly ticket allotment and a flat overage rate per extra ticket. This allows flexibility during busy seasons – you can briefly exceed your plan and just pay the per-ticket overage (e.g. $0.40 per ticket on mid-tier plans) rather than immediately forcing an upgrade. Gorgias even monitors your volume and will proactively recommend the most cost-effective plan if your usage pattern changes. There are no hidden fees; everything from add-on channel costs to overage rates is disclosed on the official pricing page.	gorgias.com gorgias.com
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Gorgias is upfront about any additional costs. Basic onboarding and support are included in subscription plans (enterprise plans come with dedicated setup help). If you choose to add optional channels/features, those are clearly indicated as add-ons – for example, Voice and SMS integrations are listed with their own pricing model. All pricing components (subscription, AI Automate add-on, overages, etc.) are documented transparently on the pricing page or proposals. In short, any extra cost for extra services or new channels is communicated in advance, with no surprise charges.	gorgias.com gorgias.com

Vendor Deep Dive

→ Inbenta

VOX Score	89.55 / 100
Coverage	18 / 20 questions "Yes"
HQ	Allen, TX
Website	www.inbenta.com

Talk to Inbenta: Ethan.harsha@inbenta.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Inbenta

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Inbenta encourages including clear bot disclosures. For example, they recommend configuring chatbots to notify users that content may be generated by AI, thereby making it transparent that an AI (not a human) is responding.	https://www.inbenta.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Inbenta's platform is built to meet strict data privacy regulations (GDPR, CCPA, HIPAA, etc.). It provides features like data subject rights handling (allowing deletion of personal data on request) and audit controls, helping customers comply with "right to be forgotten" and other AI conversation privacy requirements.	https://www.inbenta.com/

2. Consumer Trust & Frustration			
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Inbenta's NLP engine can detect user sentiment and frustration in real time. It analyzes tone and language for negative cues and recognizes when a user is unhappy or stuck (e.g. repeated unanswered queries), enabling proactive mitigation.	https://www.inbenta.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Inbenta supports smooth escalation to human agents. If the virtual agent senses frustration or if a user requests a human, the system's Live Chat module can automatically transfer the conversation to a live agent in real time, ensuring a seamless handoff.	https://www.inbenta.com/

3. Efficiency & ROI			
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Inbenta includes robust analytics to quantify support deflection and efficiency gains. Users report that the platform offers extensive metrics – for instance, one reviewer highlighted the detailed contact deflection statistics available with Inbenta. (Similar metrics for handle time reduction and first-contact resolution are tracked via the dashboard.)	https://www.g2.com/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Inbenta offers an Assist module that serves as an AI-driven agent-assist tool. It can surface relevant knowledge base articles and suggest response text to agents in real time, helping agents answer faster and more accurately. These features improve live agent productivity by providing on-the-fly recommendations.	https://www.inbenta.com/

May 2025 CX-Leader Preference Map for Inbenta

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Inbenta's platform is designed for enterprise integration via its AppHub connectors and APIs. Documentation highlights that the Inbenta AI platform integrates with all major data systems, CRMs, eCommerce tools, etc., allowing connection to legacy systems and multiple platforms. (They provide best-practice guidance and pre-built connectors for systems like Salesforce, Zendesk, SAP, etc.)	https://www.inbenta.com/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Inbenta supports real-time integrations with customer data platforms and CRMs. For example, its Assist system interoperates with CRM platforms (e.g. Salesforce), passing engagement data back-and-forth in real time. This ensures the bot and agents share a unified, up-to-date view of customer info (enabling personalized recommendations based on the latest data).	https://www.inbenta.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Inbenta does retain conversation logs and related customer data for analytics. It implements strict role-based access controls: the system defines user permission levels (owner, admin, agent, end-user, etc.) and enforces data access by role group. This ensures only authorized roles can view sensitive conversation records.	https://www.inbenta.com/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Yes. Inbenta provides auditing capabilities to review AI-driven interactions. The platform can maintain comprehensive audit trails of conversation data and agent/bot actions. These logs and compliance reports allow organizations to regularly audit the AI's behavior and ensure it meets regulatory and quality standards.	https://www.inbenta.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Inbenta's conversational AI can automate a wide range of routine queries end-to-end. For example, in retail it can check order status, process return requests, and even provide product recommendation suggestions to customers without human help. By handling these common inquiries 24/7, it offloads and reduces the live agents' workload significantly.	https://www.inbenta.com/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Inbenta's chatbot is capable of personalized recommendations in real time. It can leverage a user's browsing behavior or past purchases to suggest relevant products or content. This dynamic personalization encourages users to self-serve (e.g. discover products on their own), improving upsell opportunities.	https://www.inbenta.com/

May 2025 CX-Leader Preference Map for Inbenta

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Inbenta provides an analytics dashboard with real-time metrics on chatbot performance. Customers can monitor KPIs like user satisfaction/feedback ratings, fallback (unanswered question) rates, deflection counts, and even track conversion-related metrics. The Workspace interface lets teams see these insights continuously and identify improvement areas. (Cart abandonment impacts can be inferred via tracked conversion rates in such reports.)	https://www.inbenta.com
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Inbenta's platform can correlate AI interactions with business outcomes. Case studies show they measure eCommerce KPIs – for instance, a major retailer using Inbenta saw over 20% of its sales driven by the AI chatbot. This indicates Inbenta is tracking and reporting on AI-driven conversion lifts (and by extension can help assess metrics like AOV or churn if integrated with those data).	https://www.inbenta.com/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Inbenta is actively investing in next-gen conversational AI. Notably, in 2024 they integrated Generative AI (GPT-based LLMs) into their platform, allowing the bot to produce more human-like, original responses. They also support emerging capabilities such as voice and video chat channels for a richer omnichannel experience (demonstrating a focus on voice commerce and "agentic" AI advancements).	https://www.inbenta.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Inbenta positions itself as a long-term partner that continuously helps optimize the AI. Their team provides ongoing support to update and fine-tune the solution as things change. In practice, the system's lexicon/NLP is regularly refined (and new content added) to reflect brand updates or new products, and Inbenta's experts assist with model tuning to maintain accuracy and compliance.	https://www.inbenta.com/

May 2025 CX-Leader Preference Map for Inbenta

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Inbenta offers ongoing professional services and customer success resources throughout the deployment lifecycle. They emphasize being a "trusted long-term partner," with an experienced team that provides training, consulting, and tuning to adjust the AI solution for new business needs or seasonal changes. This ensures the AI solution can evolve in step with your business.	https://www.inbenta.com/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Inbenta provides formal Service Level Agreements. For example, their standard SLA guarantees 99.8%+ uptime for the platform. They also commit to enterprise support responsiveness (details are defined in contracts), ensuring the AI services meet performance and availability requirements necessary for critical customer interactions.	https://www.inbenta.com/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	No	No clear evidence of special pricing accommodations for seasonal volume. Inbenta's pricing is presented as enterprise licensing (e.g. a fixed high starting cost), and their public materials don't describe automatic scaling or elastic pricing for peak vs. off-peak usage. Any volume-based adjustments likely require custom negotiation (nothing openly documented about it, indicating limited transparency on that front).	https://www.softwareworld.co/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	No	These details are not publicly disclosed. Inbenta's website and listings provide baseline software pricing but do not itemize implementation or add-on channel fees. The lack of published information suggests such costs are only detailed in private proposals, not transparently listed upfront.	https://www.capterra.ca/

Vendor Deep Dive

→ Freshworks

VOX Score	90.18 / 100
Coverage	18 / 20 questions "Yes"
HQ	San Mateo, CA
Website	www.freshworks.com

Talk to Freshworks: akash.elichipuram@freshworks.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Freshworks

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	Freshworks does not add an automatic "AI" disclosure. In fact, its policy is that customers (the Freshworks users) should explicitly disclose to end-users when they are engaging with an AI-powered bot. This indicates the platform itself doesn't natively announce the bot's identity unless configured by the customer.	https://www.freshworks.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Data privacy compliance is built-in. Freshworks is GDPR-ready – for example, admins can permanently delete customers' personal data (contacts, tickets, chats) upon request to honor the "right to be forgotten". All Freshworks products support secure data handling and offer data export/deletion capabilities. (While explicit consent for bot usage isn't an automated feature, Freshworks documentation encourages obtaining user consent where applicable.)	https://support.freshdesk.com/ https://support.freshdesk.com/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Freddy AI includes sentiment analysis to gauge customer emotions in real time. It predicts the sentiment of each message and enables monitoring for negativity or frustration. This allows the system to flag unhappy users immediately. Admins can even set up automations to respond to sentiment changes (e.g., if a conversation turns negative), so the platform can detect and react to user frustration signals during live interactions.	https://crmsupport.freshworks.com/ https://crmsupport.freshworks.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Seamless bot-to-agent handoff is supported. You can configure Freddy chatbots to transfer the conversation to a human agent whenever needed – for instance, if the user asks for an agent or if rules detect frustration. Freshworks' bot builder provides an "Assign to agent" action that will route the chat to a specified live agent group in Freshchat support.freshbots.ai. Additionally, using sentiment detection rules, admins can auto-trigger an escalation to a human (or alert a supervisor) if a conversation's sentiment turns negative. This ensures a smooth transition from AI to human support when the situation calls for it.	http://support.freshbots.ai

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Comprehensive bot performance analytics are available. Freshworks tracks how many issues the AI resolves without human intervention (deflection rate). For example, Freddy's dashboard can show that after deploying bots, ticket volume to agents dropped by X%, indicating that percentage as the deflection rate. The platform also reports on resolution rates and time saved: one internal case study showed bots achieved 65% ticket deflection (and combined with other automations, 85% overall). These metrics help quantify AI's impact on handle time and first-contact resolution.	https://crmsupport.freshworks.com/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Freddy AI comes with Agent Assist capabilities. While agents are chatting or replying to tickets, Freddy can suggest answer content in real time. For example, the Reply Suggester analyzes the ticket and pulls the best response from the knowledge base, so the agent can respond faster. Freddy Copilot also offers features like automatic conversation summaries, tone adjustment suggestions, and next-step prompts to help agents handle queries more efficiently. These AI-driven recommendations reduce research time and improve agent speed and consistency.	https://crmsupport.freshworks.com/

May 2025 CX-Leader Preference Map for Freshworks

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Freshworks provides robust integration tools and guidance. Its platform includes a no-code API connector library for the chatbot, allowing calls to any external system to fetch or update data support.freshbots.ai. This means Freddy bots can integrate with legacy databases, CRM systems, ecommerce platforms, etc. Freshworks' documentation shows how to set up these API integrations and even use custom functions or webhooks for complex workflows. Additionally, Freshworks has an app marketplace and integration guides (e.g., for Salesforce, Shopify, etc.), which serve as best practices for connecting to those systems.	https://support.freshbots.ai/support/home
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Freshworks offers real-time integrations with popular eCommerce and CRM platforms. For example, the Freshdesk-Shopify integration instantly pulls a customer's Shopify order history and details into Freshdesk tickets, giving the bot or agent up-to-date information. Similarly, a Salesforce connector for Freshchat can surface CRM data live during a chat. Through these native connectors and the API framework, Freddy AI can access unified customer data (orders, profile, etc.) in near real-time to personalize responses. (Case in point: agents using the Shopify app can view order status, initiate refunds, and more directly within Freshworks – the bot can be configured to do the same via API.)	https://crmsupport.freshworks.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Conversation transcripts are stored, with granular access controls. All chats and tickets handled in Freshworks (Freshchat, Freshdesk, etc.) are saved as conversation history. The platform offers role-based permissions to control who can view or manage those records. For instance, Freshdesk's Roles feature lets admins limit what certain agents can see or do. Freshchat similarly supports role-based access – only authorized support agents can view sensitive chat content. These controls ensure that personal customer data in transcripts is visible only to the appropriate roles (e.g. a support agent can see their tickets, but maybe not HR tickets, etc., depending on role settings).	https://www.freshworks.com/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Freshworks has a "Responsible AI" framework (Freddy AI Guardian) for oversight. This includes features for content safety, traceability of AI decisions, privacy controls, and security. In practice, all AI-generated responses can be reviewed via logs (ensuring traceability of what the AI told customers). Freddy AI Guardian's policies help businesses stay compliant – e.g. it prevents the AI from exposing sensitive data and keeps an audit trail of AI interactions. Moreover, admins can continuously monitor AI performance (through the analytics and conversation history) to audit for any compliance issues.	https://teamrelated.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Freddy AI can handle common questions end-to-end. Using the chatbot builder and integrations, you can automate scenarios like checking order status, initiating returns, or providing product info without agent involvement. For example, a Freddy bot can ask the user for an order ID and then call an API to retrieve the order status or process a return. Freshworks supports these workflows via its API library – meaning typical eCommerce support tasks (order tracking, cancellations, refunds) can be resolved 24/7 by the bot. This offloads a significant volume of repetitive queries from live agents.	https://support.freshdesk.com/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	With available customer data, Freddy can personalize responses (including product suggestions). The bot can leverage stored attributes like a user's past purchases or stated preferences and use that to tailor its answers. For instance, Freshworks allows capturing custom properties (e.g. preferred product category) and then using that in logic or API calls. A Freddy AI Agent can "seamlessly adapt" if a customer switches from a support query to a product inquiry, suggesting relevant items based on context. While Freshworks doesn't offer a built-in product recommendation engine, it can integrate with your product catalog or CDP to deliver personalized recommendations via the chatbot.	https://support.freshdesk.com/

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May 2025 CX-Leader Preference Map for Freshworks

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Rich real-time dashboards are provided for Conversational AI. Freshworks includes a Chatbot Performance Dashboard (overview report) that shows metrics like customer satisfaction (CSAT) with bot interactions, how many conversations the bot handled vs. handed off, resolution rates, and more. It specifically tracks "fallbacks" or unanswered questions – for example, the default reports highlight how often the bot said "sorry" or had to escalate (which is essentially the fallback rate). These reports update in real time and can be filtered by bot, timeframe, etc. (Metrics like cart abandonment would be external to Freshworks, but any impact of the bot on conversion would have to be measured by integrating with eCommerce analytics.) Overall, all important chatbot KPIs (CSAT, deflection, handover count, response time) are visible live in the Freshworks analytics module.	https://crmsupport.freshworks.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	Not natively. Freshworks' out-of-the-box analytics focus on support-centric metrics rather than business KPIs like AOV or revenue uplift. The platform does not have a built-in report that attributes changes in sales or churn directly to bot interactions. (Such analysis would typically require exporting data and correlating chatbot engagement with eCommerce results using external tools.) In Freshworks, the AI's success is measured by support outcomes (resolution rates, CSAT, etc.), and any impact on eCommerce KPIs would need to be assessed by the customer's own analytics. There is no direct, native tracking of things like upsell conversion rate due to the bot.	https://crmsupport.freshworks.com/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Freshworks is continually innovating with next-gen AI. They have recently embedded generative AI (GPT) across the Freddy platform – for example, Freddy can now automatically summarize conversations, draft replies, and generate knowledge articles using OpenAI's large language models. Freshworks also launched the Freddy AI Agent which leverages these generative capabilities to handle more free-form queries without predefined flows (it can handle a return question then pivot to a product recommendation seamlessly). Additionally, Freshworks supports voice-based AI interactions: Freddy can operate over voice channels (it was shown to work with Google Assistant for voice calls), pointing toward voice commerce potential. Overall, the roadmap clearly includes advanced "agentic" AI functions and integrations of the latest AI tech into their products.	https://www.globenewswire.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Freshworks enables continuous AI optimization. Freddy AI has an "always-on" learning approach – it can monitor unanswered questions and suggest new Q&A pairs or flow improvements (so the knowledge base evolves as customer queries change). The platform allows versioning of bots and easy updates, which means as your product or policies change, you can retrain or tweak the AI dialogs promptly. While formal "managed model training" services are not explicitly packaged, Freshworks' Customer Success and support teams do assist clients in reviewing bot performance and optimizing it over time. The system itself provides analytics and recommendations (e.g., identifying new intents from chat logs) to guide ongoing training.	https://www.agentlocker.ai/

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May 2025 CX-Leader Preference Map for Freshworks

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Freshworks (and its partners) provide ongoing services to support AI adaptation. The company has a Professional Services team that guides customers at every step of their Freshworks journey. They offer implementation help, bot-building expertise, training for your team, and periodic check-ins to adjust configurations as needed. In particular, Freshworks or certified partners can assist with expanding your Freddy AI to new use-cases or channels when your business grows. (For example, some partners specialize in Freshchat bot implementation and training, ensuring the AI stays optimized through business changes.) This means you're not left on your own after go-live – continuous consulting is available to refine the AI solution over time.	https://www.freshworks.com/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Enterprise-grade SLAs back the Freshworks platform (including AI features). Freshworks commits to high availability and performance. For instance, they publicly guarantee 99.8% uptime for their services on a monthly basis – with service credits available if this uptime isn't met. Support responsiveness is also ensured through defined support SLAs (enterprise customers have 24/7 support with fast response targets for critical issues). In short, the same robust uptime and support guarantees that apply to Freshdesk/Freshchat also cover the Freddy AI components, so AI-driven interactions are under a reliable SLA umbrella.	https://www.applytosupply.digital marketplace.service.gov.uk/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Pricing for Freddy AI is transparent and elastic. Freshworks clearly publishes the pricing model for chatbot usage – typically based on session packs. For example, customers can purchase Freddy Self-service in units of 1,000 bot sessions for $100 support.freshbots.ai, and you can increase or decrease the number of packs each billing cycle depending on expected volumesupport.freshbots.ai. This means if you anticipate a holiday surge, you add packs for that period (and you won't be penalized beyond the pack cost – no surprise overage fees). Unused sessions expire at the end of the cycle, and you can scale down afterward. All such costs are clearly spelled out, and any add-on like extra bot sessions or additional agents are transparently listed in pricing plans, avoiding hidden charges.	support.freshbots.ai
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	All implementation and expansion costs are clearly delineated. Freshworks separates software subscription fees from any one-time setup or professional service fees in their proposals. For instance, if you require Freshchat bot implementation assistance, that service can be purchased through Freshworks or a partner and will be quoted as a distinct line item (with a defined scope like bot configuration and training). Similarly, adding a new channel (say WhatsApp or a new bot) might incur an add-on fee, but those are transparently listed in the pricing documentation or proposal. Freshworks' sales proposals itemize each component – licenses, support packages, services – so you have full visibility into what you're paying for, with no surprise costs down the line.	https://www.aidoos.com/

Vendor Deep Dive

→ Rep AI

VOX Score	90.86 / 100
Coverage	18 / 20 questions "Yes"
HQ	New York, NY
Website	www.hellorep.ai

Talk to Rep AI: aron@hellorep.ai

[Ask VOX for Introduction](#)

May 2025 CX-Leader Preference Map for Rep AI

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	The Rep AI chatbot interface includes branding that reveals its AI nature. For example, a "Powered by Rep" label appears on the chat widget, indicating to users that an AI assistant (not a human) is responding ([Remove the "Assisted by Rep" note from your Shopify orders – Rep AI - Help]. Merchants can customize the bot's welcome message and avatar, but by default there is clear visual indication that the assistant is AI-driven.	https://help.hellorep.ai/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Rep AI is built with data privacy compliance in mind. It employs robust data protection and encryption and adheres to major privacy laws like GDPR and CCPA. The platform supports user data rights (for example, customers can request deletion of personal data to fulfill "right to be forgotten" obligations) and it requires explicit end-user consent for collecting personal information wherever applicable laws mandate it.	https://www.hellorep.ai/ https://www.hellorep.ai/ https://voicefront-assets.s3.amazonaws.com/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Rep AI monitors customer sentiment and behavior during chats. The system explicitly asks customers to rate conversations as helpful or unhelpful, capturing negative feedback in real time. It also uses behavioral cues to infer frustration or disengagement – for instance, Rep's AI can detect when a shopper is about to abandon the site (92% accuracy) and proactively engage them. These mechanisms allow Rep to recognize frustration signals and adjust (or escalate) accordingly. Note from vendor: We also share an analysis of the shopper emotions when approaching our chat. The brand can see under our Shopper intelligence page- A breakdown of what was the initial sentiment of the shopper when reaching out the chat.	https://help.hellorep.ai/ https://help.hellorep.ai/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	The platform supports smooth escalation to human agents whenever needed. If the AI cannot adequately assist or the user prefers a human, Rep AI can **seamlessly transfer the conversation to a live chat agent**. This hand-off mechanism ensures complex or sensitive issues are handled by a person. In practice, Rep AI covers most inquiries but will open a help ticket or route to a human agent whenever the situation warrants human intervention. Note from vendor: When handing off a ticket, we also add a summary of the chat conversations to minimize the handling time of the human. Brands can decide how these flows look like or when does the hand off is happening as well.	https://www.hellorep.ai/ https://www.hellorep.ai/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Rep AI's analytics include support efficiency metrics such as deflection and resolution rates. For example, customers report **80% fewer support tickets** after implementing Rep (indicating significant call/chat deflection). The platform also tracks what percentage of inquiries are resolved fully by AI – often 97–99%, demonstrating high first-contact resolution. These metrics are visible in dashboards and case studies, allowing ROI measurement in terms of reduced handle times and workload on live agents.	https://www.hellorep.ai/ https://www.hellorep.ai/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Rep AI offers features to assist human agents. Notably, it includes an **"AI Coaching" system** that uses machine learning to train and improve customer service agents. This can manifest as guidance or suggestions based on AI insights (for instance, surfacing relevant knowledge or best-response recommendations when an agent takes over). By learning from interactions, Rep AI's backend helps agents handle complex queries more effectively. (Integration with helpdesks like Zendesk/Gorgias also means agents see the AI conversation context and suggested info immediately.)	https://www.hellorep.ai/

May 2025 CX-Leader Preference Map for Rep AI

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	No	Rep AI's integrations are currently focused on Shopify and its ecosystem. Official documentation and one-click connectors exist for Shopify stores and popular apps (e.g. Gorgias, Zendesk, Klaviyo), making integration within that tech stack straightforward. However, the solution does not yet support other eCommerce platforms or legacy systems out-of-the-box – it works only with Shopify at the moment. The team is open to exploring custom integrations for platforms like WooCommerce upon request, but no general best-practice guide for enterprise legacy integration is published as of now.	https://www.hellorep.ai/#:~:text= https://www.hellorep.ai/ https://help.hellorep.ai/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Rep AI connects with key platforms to leverage unified data. It **integrates seamlessly with Shopify** (syncing product catalogs and FAQs in real-time), and also ties into popular CRM/support and marketing tools (e.g. **Gorgias, Zendesk, Klaviyo, Attentive**) for up-to-date customer information. These integrations occur near-real-time – for example, inventory or order updates from Shopify are immediately reflected in the AI's responses. This ensures the AI concierge has the latest customer data and context to personalize interactions.	https://www.hellorep.ai/ https://apps.shopify.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	All Rep AI conversations are recorded and stored for review. Businesses can access transcripts via the Rep dashboard. The platform supports multi-user access to this data by allowing merchants to invite team members to the console. While every authorized team member can see the conversation records (no mention of granular role permissions in docs), access is controllable at least to the extent that only invited users (e.g. support managers or admins) can log in to view customer conversations. In short, data is stored securely and accessible to the appropriate personnel, but there isn't an elaborate role-based restriction system described.	https://www.hellorep.ai/ https://help.hellorep.ai/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	No	Hellorep.ai's official resources do not mention any specific built-in or recommended AI audit or compliance-check tools for customer conversations. The platform offers a conversation dashboard that records all AI–customer chats for review and it emphasizes data protection with compliance to privacy regulations (GDPR/CCPA), but no dedicated auditing or compliance feature is indicated.	https://help.hellorep.ai/ https://www.hellorep.ai/#:~:text= https://help.hellorep.ai/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Rep AI is designed to handle the majority of routine customer questions without human intervention. It can automatically address **order-related inquiries** (order status tracking, cancellations, address changes, initiating returns/exchanges) within the chat interface. It also provides product info and recommendations through AI, functioning as a virtual sales rep. In fact, the platform is capable of covering up to **97% of support inquiries** on its own, drastically reducing what gets passed to live agents.	https://www.hellorep.ai/ https://www.hellorep.ai/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Personalization is a core feature of Rep AI. The AI concierge **uses customer preferences and past purchase history to tailor product recommendations**. For instance, it will remember a shopper's browsing behavior or sizes and suggest relevant items. Through integration with the store's customer data (and reviews via Yotpo, etc.), the bot can offer contextually relevant upsells and cross-sells. This dynamic personalization drives a more helpful self-service experience that mimics an in-store associate.	https://www.hellorep.ai/

May 2025 CX-Leader Preference Map for Rep AI

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Rep AI provides a real-time analytics dashboard for all key metrics. Users can see conversation volumes, conversion rates, and customer feedback in one place. The dashboard tracks indicators like shopper satisfaction (via the "helpful/unhelpful" ratings on chats) and fallback/unanswered question rates (so businesses know when the AI couldn't help). It also correlates AI interactions with outcomes like recovered carts or increased conversion, giving immediate visibility into KPIs like abandonment reduction. All these stats update live and can be filtered (e.g., by timeframe or tag) for granular insight.	https://www.hellorep.ai/ https://help.hellorep.ai/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	Rep AI's reporting and case studies explicitly highlight eCommerce performance lifts attributable to the AI. For example, merchants have seen conversion rate and **AOV increases** after deploying Rep (e.g. +16% average order value). The platform tracks upsells/cross-sells made by the AI concierge (and resulting revenue), as well as changes in repeat purchase rate or churn proxies (like reduction in customers needing support escalation). These metrics are part of the "AI Data" insights package, demonstrating how AI-driven engagements boost basket size and retention.	https://www.hellorep.ai/ https://www.hellorep.ai/

8. Roadmap & Future Innovations

Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Rep AI stays at the cutting edge of conversational tech. The chatbot already uses **generative AI (GPT-based)** to craft natural, context-aware responses. The company also pioneered voiceCommerce capabilities: through a partnership with Amazon Pay, Rep enabled voice-driven shopping via Alexa, providing a virtual voice shopping assistant. While their main focus now is chat, this indicates strong agentic AI credentials (multi-modal AI concierge, autonomous assistance). They continue to innovate with "behavioral AI" for proactive engagement and likely explore advanced AI features as the space evolves.	https://apps.shopify.com/ https://www.hellorep.ai/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	The Rep AI platform continuously learns and updates itself. It automatically ingests **new product data or site content in real-time** – the AI is constantly scanning the catalog so information stays up-to-date without manual effort. Additionally, Rep offers tools for ongoing AI training: admins can easily fine-tune responses or add new knowledge via the console (for example, teaching the AI about new product lines or policy changes). For larger customers, the Rep team also provides periodic optimization and retraining support (ensuring the AI maintains the brand's tone and complies with any new regulations).	https://apps.shopify.com/ https://help.hellorep.ai/

May 2025 CX-Leader Preference Map for Rep AI

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Rep AI provides ongoing customer success and support services to ensure the AI chatbot adapts to your evolving needs. They offer hands-on onboarding and continuous optimization support — a dedicated customer success team works with clients to maximize results over time. The company also emphasizes training and education for clients (e.g. updating users on new features and coaching them on best usage), which helps the solution keep pace with changes in your business.	https://www.hellorep.ai/#:~:text= https://www.hellorep.ai/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Rep AI offers a formal Service Level Agreement to enterprise clients. In their SLA, the company defines its commitments to uptime and support response times. (For instance, they target high availability – industry-standard uptime around 99.9% – and prompt resolution of any critical issues.) Additionally, Rep AI is confident enough in performance to offer guarantees like a 5× ROI or your money back. This combination of technical SLAs and performance guarantees ensures reliability for mission-critical AI customer interactions.	https://voicefront-assets.s3.amazonaws.com/ https://www.hellorep.ai/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Rep's pricing model is transparent and designed to be predictable during volume fluctuations. **Plans are based on site traffic tiers**, and they charge a flat rate per tier rather than per interaction. This means merchants aren't penalized with surprise fees if the chatbot usage spikes during peak season – as long as traffic is within the subscribed band, the cost remains the same. The company explicitly states it doesn't "push" extra chat volume charges, focusing instead on a consistent fee. In short, pricing scales logically with business size, and seasonal surges are handled by the chosen plan without hidden costs. Note from vendor: we give brands the option to upgrade or downgrade on their own and we don't gate keep it. We also inform customers via a few emails if they are going to exceed their plan visitor limitations.	https://www.hellorep.ai/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	For standard deployments (e.g., on Shopify), Rep AI requires minimal implementation effort – it's essentially included in the subscription (with a free 30-day trial to start). Any additional costs for premium services or new channels are communicated upfront. For example, integrating an additional channel like voice or social media would be scoped with the Rep team as a custom integration (as noted, they are open to such expansions. The pricing page indicates exactly how subscriptions are priced (by visitors and catalog size) and the company's ROI guarantee underscores their transparent approach. There is no indication of hidden charges; all professional services or add-ons are clearly outlined during the sales proposal stage.	https://www.hellorep.ai/ https://help.hellorep.ai/

Vendor Deep Dive

→ Kustomer

VOX Score	94.78 / 100
Coverage	19 / 20 questions "Yes"
HQ	Short Hills, NJ
Website	www.kustomer.com

Talk to Kustomer: www.kustomer.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Kustomer

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Kustomer's chat assistant clearly discloses its bot identity. By default, messages sent by the AI assistant are labeled "Bot" to indicate to customers they're not speaking to a human. Kustomer's best practices also recommend an introductory message like "Hello… I am an AI bot and not a real person" to ensure transparency.	help.kustomer.com help.kustomer.com
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Kustomer adheres to data privacy regulations (GDPR, CCPA, etc.) and has measures for compliant AI use. Its AI FAQ confirms no customer data is used to train global models and that data handling complies with GDPR/CCPA. Kustomer's documentation advises obtaining user consent and transparency when using AI chat (e.g. a welcome message: "By using this chat, you agree that your communications can be recorded…"), which addresses consent and disclosure requirements.	kustomer.com help.kustomer.com

2. Consumer Trust & Frustration

2. Consumer Trust & Frustration	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Kustomer's AI monitors customer sentiment during conversations. The Kustomer Assist AI continuously analyzes language and tone to gauge emotional state; if it detects frustration, it can escalate the issue to a human or suggest a de-escalation response. This real-time sentiment analysis helps identify frustration signals and react accordingly.	https://www.kustomer.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Kustomer's platform supports automatic handoff from bot to human. If the AI notices customer frustration or upon customer request, it can transfer the conversation to a human agent. In fact, Kustomer's AI Agents have long been able to hand off to humans "when needed," ensuring a smooth transition to a live agent whenever the situation calls for it.	kustomer.com kustomer.com

3. Efficiency & ROI

3. Efficiency & ROI	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Kustomer offers reporting dashboards that quantify AI impacts. The system tracks deflection and resolution rates — for example, Customer Assist dashboards show deflection scores and resolution (issue closure) rates. Case studies also highlight AI-driven deflection: Everlane achieved a 4× increase in self-service deflections using Kustomer's AI. These metrics demonstrate reduced workload (and by extension lower handle times and higher first-contact resolution) due to the AI.	kustomer.com kustomer.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Kustomer provides an Agent Assist AI copilot for live agents. It can suggest responses and surface knowledge in real time. For example, Kustomer's Agent Assist offers "Suggested responses" – AI-generated reply suggestions informed by CRM data and knowledge base content – and can instantly retrieve relevant info or even summarize conversations for the agent. These features help agents respond faster and more accurately.	kustomer.com

May 2025 CX-Leader Preference Map for Kustomer

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Kustomer supports extensive integrations and provides guidance for complex environments. Its developer resources emphasize an open API platform for connecting legacy or custom systems. Kustomer also offers pre-built eCommerce and CRM connectors (e.g. Shopify, Magento, Salesforce apps) and even an importer tool to migrate data from other CRMs like Zendesk. This documentation and tooling reflect best practices for integrating Kustomer into a multi-system enterprise landscape.	developer.kustomer.com help.kustomer.com
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Kustomer's platform syncs with external systems in real time to personalize AI interactions. Its AI can pull in live eCommerce/CRM data: for instance, AI Agents now integrate with third-party data sources like Shopify in real time, allowing the bot to reference up-to-date order info. Kustomer specifically highlights using real-time CRM data in chatbot workflows to deliver tailored, context-rich responses.	kustomer.com kustomer.com

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Kustomer does store conversation transcripts and customer data as part of its CRM timeline. The platform employs enterprise-grade security controls, including role-based access control (RBAC) to restrict data to authorized roles. (Kustomer confirms that all data is encrypted in transit/at rest and that RBAC is in place as a privacy safeguard.) These measures ensure only permitted staff can view sensitive conversation records.	kustomer.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Kustomer enables oversight of AI interactions through built-in observability tools. It recently introduced AI Agent observability, allowing teams to inspect detailed AI "traces" of entire conversations. This means admins can review what the AI did or decided in a conversation, aiding in auditing AI behavior for compliance and quality. Additionally, Kustomer's trust resources outline how AI outputs can be aligned with brand guidelines (e.g. configured tone/instructions), which helps maintain compliance standards.	kustomer.com kustomer.com

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Kustomer's Customer Assist chatbot is designed to handle routine questions end-to-end. It can automatically resolve frequent requests like checking order status, processing returns, or FAQs without human intervention. By leveraging knowledge bases and integrations, the AI provides instant answers or performs simple tasks, thereby deflecting these common inquiries away from live agents.	kustomer.com
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Kustomer's conversational AI is capable of personalized dialogues, including recommending products based on customer data. The platform supports dynamic conversation workflows that use customer inputs and profile/CRM data to tailor suggestions. For example, a chatbot flow could leverage past purchases or preferences (available via the unified customer profile) to offer relevant product recommendations, creating a personalized self-service experience.	kustomer.com

May 2025 CX-Leader Preference Map for Kustomer

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Kustomer provides real-time dashboards to monitor AI performance metrics. Teams can track customer satisfaction (CSAT) scores, resolution rates, deflection rates, and more through the reporting interface. The AI reporting is interactive – for example, managers can drill down into conversations from the AI report charts – to analyze fallbacks or unanswered queries. (eCommerce KPIs like cart abandonment would be outside Kustomer's built-in metrics, but support-related metrics are well covered in real time.)	kustomer.com kustomer.com
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	Kustomer's out-of-the-box analytics focus on customer service metrics rather than direct eCommerce KPIs. The platform tracks support outcomes (CSAT, resolution, deflection), but it does not natively report on business metrics like average order value or upsell conversion as a result of AI chats. Any impact on those would need to be inferred or measured via external eCommerce analytics. Kustomer's documentation and dashboards make no mention of tracking AOV or churn tied to AI, indicating these are not explicitly measured within the product.	kustomer.com

8. Roadmap & Future Innovations

Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Kustomer is aggressively innovating in Conversational AI. Its platform uses advanced generative AI (large language models) to power human-like, contextually aware responses. Kustomer has launched AI Agents for Voice, a native AI-driven voice channel enabling human-like voice interactions without third-party IVR, which is a cutting-edge offering in voice AI. They also recently expanded AI Agents to handle more autonomous actions and even allow bidirectional handoffs between AI and humans. These moves demonstrate Kustomer's ongoing investment in "next-gen" and agentic AI capabilities.	businesswire.com businesswire.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Kustomer's AI is designed to continuously adapt to the client's evolving data and needs. For instance, its intent recognition supports custom "org-specific" models trained on the client's own data, which can be updated as new intents or products emerge. Admins can update knowledge bases or adjust the AI's configured instructions (tone, policies) at any time to reflect brand changes. While the underlying generative models are managed by Kustomer's partners (e.g. OpenAI), Kustomer's solution provides tools and services (via Customer Success or Professional Services) to regularly fine-tune the AI's performance and accuracy as the business evolves.	kustomer.com kustomer.com

May 2025 CX-Leader Preference Map for Kustomer

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Kustomer backs its platform with ongoing customer success and support services. The company even appointed a Chief Customer Officer to ensure client needs are met "at every step" of their journey. In practice, Kustomer offers tiered support plans – e.g. Premier Support provides a dedicated team for expert guidance and proactive solutions to maximize success. This means as your business changes or peak season approaches, Kustomer's team can assist with training the AI on new scenarios, adjusting workflows, and providing consulting to optimize the system.	businesswire.com kustomer.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Kustomer provides enterprise-grade SLAs covering its platform (including AI features). The Service Level Agreement guarantees 99.9% uptime for the Kustomer platform (Ultimate and Ultimate AI editions), ensuring reliability for AI chat and voice services. Support responsiveness is also assured: standard support operates 24×7 with target response times as quick as 2 hours for critical issues. These commitments demonstrate formal guarantees on uptime and support quality for AI-driven interactions.	dev1.kustomere25mcp.eight25sites.com kustomer.com

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Kustomer has moved to a transparent usage-based pricing model that scales with volume. It offers conversation-based pricing (pay per conversation) with no limit on agent seats. This means if volume spikes seasonally, you pay for the higher conversation count but aren't penalized with extra seat licenses. All AI capabilities are included in the pricing (or as clearly-priced add-ons) with no hidden fees – Kustomer explicitly states businesses "only pay for what they use" and can scale without surprise costs or feesbusinesswire.com.	businesswire.com businesswire.com
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Kustomer's pricing and proposals delineate any extra services. For example, the pricing FAQ notes that for seat-based plans the total cost = seats + AI add-ons + optional Premier Support or Implementation plans. In other words, onboarding services and support packages are offered as distinct line items. Similarly, new channel integrations (e.g. WhatsApp, SMS, voice) are usage-based add-ons that are transparently listed. This clarity in pricing ensures all implementation or expansion costs are upfront in proposals.	kustomer.com kustomer.com

Vendor Deep Dive

→ Quiq

VOX Score	94.78 / 100
Coverage	19 / 20 questions "Yes"
HQ	Bozeman, MT
Website	www.quiq.com

Talk to Quiq: www.quiq.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Quiq

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Quiq supports transparency by prompting businesses to disclose AI assistants. In practice, companies using Quiq can configure an initial chatbot message or UI element to clarify the interaction is with an AI. Quiq's own best-practice guide recommends including a "chat disclosure" and disclaimer at the start of a bot conversation. This ensures customers are notified from the first message that they're conversing with an AI.	https://knowledge.quiq.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Quiq provides features to meet AI compliance needs. For example, administrators can permanently delete customer data to fulfill GDPR "right to be forgotten" requests Quiq also enables obtaining explicit user consent at conversation start – best practices suggest sending an upfront opt-in disclaimer for bot interactions. These tools help ensure data privacy and consent requirements are addressed.	https://knowledge.quiq.com/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Quiq's native bots can detect customer frustration in real time using sentiment analysis. The platform includes a "Customer Upset" event that automatically fires whenever angry sentiment is detected . This allows the system to recognize if a user is getting frustrated (e.g. negative tone or repeated failures) and then take action accordingly (such as escalating or adjusting responses).	https://knowledge.quiq.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Quiq supports seamless escalations from its AI assistant to human agents whenever needed. The bot designer provides built-in events and actions to transfer conversations: for instance, upon a "Customer Upset" sentiment trigger, the bot can automatically route the chat to a live agent. Likewise, a "Human Agent Requested" event listens for user intent to reach a human and immediately hands off the conversation when such intent is detected. This ensures frustrated users or those who prefer a person can be transferred without friction.	https://knowledge.quiq.com/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Quiq offers robust analytics to quantify AI impact on service efficiency. The platform's reporting suite (Quiq Insights) can track how many interactions the AI resolves without agent intervention (deflection), as well as key metrics like average handle time and resolution rates. In fact, Quiq's AI Studio includes real-time observability of AI performance. Users can measure AI-specific KPIs side by side with contact center metrics – for example, comparing conversation counts, resolution percentages, and handle times between AI and live agents.	https://quiq.com/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Quiq's platform has native Agent Assist capabilities powered by AI. The Quiq Agent AI Assistant suggests complete response drafts to human agents during a conversation. It can pull in knowledge from enterprise systems (e.g. knowledge bases or CRM data) to recommend the best answers in real time. Additionally, Quiq's Compose feature uses generative AI to refine an agent's typed reply into a well-written, empathetic message. These AI-driven assist tools help agents respond faster and more consistently, lowering their handling time.	https://quiq.com/

May 2025 CX-Leader Preference Map for Quiq

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Quiq's documentation addresses enterprise integration scenarios in depth. The Quiq Implementation Guide explicitly notes that Quiq is designed to support "deep integration requirements of large enterprises," and even outlines a phased approach for rolling out integrations. Developer docs detail integration frameworks (REST APIs, webhooks, and UI extensions) for tying into legacy systems and CRMs. In practice, Quiq's implementation team provides guidance and best practices throughout deployment to ensure smooth integration with existing enterprise tech.	https://knowledge.quiq.com/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Quiq offers real-time integrations with leading systems so the AI has up-to-date customer data. Out-of-the-box connectors and APIs let Quiq seamlessly connect with eCommerce and CRM platforms like Salesforce, Oracle, Zendesk, Shopify, SAP and more. This means an AI assistant built on Quiq can retrieve customer profiles, order history, or other data on the fly to personalize responses. The Agent AI Assistant, for example, can be "grounded in data from any of your enterprise systems" (knowledge bases, case history, etc.), demonstrating that the platform syncs with external data in real time for personalized interactions.	https://quiq.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Quiq does store conversation transcripts and related customer data for reporting and continuity. The platform provides granular, role-based access controls to protect this data. Administrators can define Roles that determine which conversation queues and records a user can access. For instance, an agent role may only see conversations assigned to their queue, while managers/admins can access broader data. These role settings, combined with features like data redaction and audit logs, ensure that only authorized team members can view sensitive conversation content.	https://knowledge.quiq.com/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Quiq's platform includes guardrails and monitoring tools to ensure AI interactions remain compliant. For example, Quiq's AI solution has built-in guardrails and safety checks so that an AI assistant stays on-brand and avoids problematic output. All AI-driven conversations are logged, and admins can review transcripts or use the Audit Log for key events (like deletions or escalations). These features let organizations audit what the AI is saying and verify it adheres to policies. Quiq's emphasis on "observability" and "AI guardrails" means compliance and quality checks are an integral part of the AI deployment life cycle.	https://quiq.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Quiq's conversational AI is designed to handle routine customer questions end-to-end, deflecting those from agents. Companies use Quiq's AI Assistants to answer FAQs like order tracking, return status, store hours, basic troubleshooting, etc. In fact, Quiq touts that its AI can "answer routine questions with AI on voice and native messaging channels", freeing up agents for more complex issues. The platform allows integration with back-end systems (for example, checking order status via API), enabling the bot to fully resolve common inquiries without human intervention. This automation significantly offloads live agent volume.	https://quiq.com/aiagents/

May 2025 CX-Leader Preference Map for Quiq

	Yes/No	Details	Source(s)
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Quiq's AI can personalize interactions with context like purchase history. The platform supports using customer data to tailor recommendations in real time. For instance, Quiq highlights that it helps retailers "personalize CX with AI-powered product recommendations" to boost satisfaction. Customer profile and past interaction data are made available to the AI, so a Quiq chatbot can suggest relevant products or solutions based on a user's history. This dynamic personalization encourages customers to self-serve (e.g., discovering products or answers themselves) while feeling individually catered to.	https://quiq.com/platform/

7. Measurement & Reporting

	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Quiq provides comprehensive real-time dashboards for conversational AI performance. Users have customizable reporting that can display AI-specific metrics alongside contact center metrics. For example, you can monitor bot conversation volumes, fallback intent rates, and customer feedback (CSAT) live. The platform's Reporting and Analytics module includes purpose-built messaging KPIs (like CSAT, NPS, resolution rates) and allows drilling down into every AI interaction turn. Any impacts on sales funnels (like cart conversions or drop-offs due to bot interactions) can be tracked by correlating conversation data with eCommerce systems, thanks to Quiq's integration and export capabilities.	https://quiq.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	Not natively. Quiq's out-of-the-box analytics focus on customer service metrics (e.g., response times, CSAT, resolution rates) rather than direct eCommerce financial KPIs. While the platform can facilitate higher Average Order Value or upsells through personalized AI engagements, it does not explicitly provide a built-in dashboard for revenue metrics like AOV or churn attributable solely to the bot. Measuring those outcomes would typically require combining Quiq's conversation data with eCommerce/CRM analytics on the client side. In short, there's no clear native reporting of business financial KPIs tied specifically to AI in Quiq's documentation.	https://quiq.com/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Quiq is at the forefront of next-gen conversational AI capabilities. The platform integrates Large Language Models to enable generative AI responses and more human-like conversations. Quiq even brands itself as an "enterprise agentic AI" provider, offering an AI Studio for building advanced autonomous agents. On the voice side, Quiq supports Voice AI – allowing AI agents to handle phone calls/IVR with natural language, not just text. These developments (generative AI, agentic multi-agent orchestration, and voice interaction) are active parts of Quiq's product roadmap and offerings.	https://www.g2.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Quiq doesn't just hand over an AI bot and leave it static – they offer ongoing support to adapt and improve the AI over time. Their team can assist with continuous optimization, retraining models or updating conversation flows as the business evolves. In fact, Quiq emphasizes that customers can choose how much help they need from its experts for ongoing improvements: the company can "deliver smooth implementation and [provide] ongoing improvements", and even manage or co-manage the AI solution as products or policies change. This means your AI assistant can be kept up-to-date with new product lines, branding tweaks, and compliance requirements through continuous tuning with Quiq's help.	https://quiq.com/

May 2025 CX-Leader Preference Map for Quiq

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Quiq offers ongoing professional services and consulting to ensure the AI solution keeps pace with your business. Beyond the initial deployment, their team remains available for enhancements and training. Quiq highlights its flexible engagement options – you can have their AI experts fully manage, co-pilot, or periodically assist with your solution depending on your needs. This includes adjusting the AI for new products or use cases, seasonal updates, and providing additional training to your staff. In short, Quiq provides continuous support and expertise to adapt the AI as your business changes over time.	https://quiq.com/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Quiq commits to enterprise-grade SLAs covering its platform (and thus AI interactions). They target a high system uptime (e.g. 99.5% availability monthly) and contractually offer service credits if targets aren't met. Support responsiveness is clearly defined: Quiq provides 24×7 critical support with guaranteed response times (within 1 hour for urgent issues). These guarantees apply to the AI-driven services just as to the rest of the platform. While specific performance of AI answers can't be "guaranteed," the reliability of the AI service (uptime, speed) is ensured via the same strict SLAs that Quiq provides for its messaging platform.	https://quiq.com/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Quiq's pricing model is designed to be flexible and usage-based. They charge primarily per conversation rather than per seat, which can scale up or down with volume. In competitive comparisons, Quiq is noted to "scale with your business, providing flexible plans that fit your needs without overpaying". This suggests pricing can accommodate seasonal spikes (you pay for what you use) and that there aren't surprise charges for normal growth. Customers are encouraged to work with Quiq on a plan that anticipates their peak volumes, ensuring cost predictability and no hidden fees.	https://quiq.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	All such costs are made transparent during the sales process. Each Quiq customer agreement uses detailed order forms that list the services purchased and their fees. This means that any upfront implementation fees, ongoing professional service packages, or additional channel add-on costs would be explicitly outlined in the proposal and contract. Quiq's aim is to "aim for transparency in its pricing", so clients know the total cost of ownership and can plan for future expansions without surprises.	

Vendor Deep Dive

→ eGain

VOX Score	94.78 / 100
Coverage	19 / 20 questions "Yes"
HQ	Sunnyvale, CA
Website	www.egain.com

Talk to eGain: www.egain.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for eGain

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	eGain's virtual assistant greets users and acts as a clearly automated agent, letting customers know they're dealing with a virtual assistant rather than a human. For example, the assistant greets site visitors and can say it will transfer to a human if needed.	https://hd.egain.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	eGain builds compliance into its AI tools. The virtual assistant explicitly asks users for permission before collecting personal data, ensuring consent and privacy. Administrators can also set AI guardrails (via an AI Console) to enforce policies and keep generative AI usage compliant.	https://hd.egain.com/ https://www.egain.com/

2. Consumer Trust & Frustration	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	eGain's conversational AI monitors user sentiment and behavior. In practice, the chatbot can detect negative customer sentiment or repeated failures to help, and then adjust accordingly. Best-practice guidance from eGain explicitly states bots should escalate based on customer sentiment or if the bot can't resolve the issue.	https://www.egain.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Seamless escalation is supported. eGain's virtual assistant can transfer the conversation to a human agent at any point a handoff is needed – for example, if the user is frustrated or requests a human. The context carries over so the agent sees the chat history.	https://www.egain.com/

3. Efficiency & ROI	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	eGain publishes robust ROI metrics from clients. For instance, one government agency using eGain's conversational AI deflected 70% of incoming calls and reduced case handling time by 25%, thanks to the virtual assistant and knowledge automation. Other cases report improvements in First-Contact Resolution (e.g. +36% FCR) from eGain AI deployments .	https://www.egain.com/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	eGain offers rich agent-assist AI. For example, the AssistGPT capability can automatically generate suggested responses for agents and tailor answers to the customer's context and the company's knowledge base and tone. Separately, eGain's Virtual Assistant for Agents continuously serves up relevant knowledge and guidance to agents in real time during chats.	egain.com egain.com

May 2025 CX-Leader Preference Map for eGain

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	eGain's platform is built to integrate with enterprise systems. It provides an open Customer Engagement Hub architecture and tools like the eGain Content Adapter™ to connect with legacy content repositories and CRM systems. This allows information from sources like Lotus Notes, SharePoint, legacy databases, etc., to be reused in the AI knowledge base. In short, eGain has documented connectors and best practices for integrating with third-party systems and data.	https://www.egain.com/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	eGain supports real-time integration with leading customer systems of record. Out-of-the-box connectors exist for popular CRM, eCommerce, and backend systems, enabling the AI to pull customer data as needed. (For example, eGain's platform natively integrates with major CRM/eCommerce solutions so agents get a unified view and customers receive personalized answers from a single system.)	https://www.egain.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Yes, eGain logs and stores all interaction data (chat transcripts, etc.) in its system. For example, managers can even access transcripts of all customer dialogs through eGain's analytics tools. The platform includes granular role-based access controls – different user roles only see content appropriate to their permissions. (Agents and knowledge workers have tiered access to information based on role, ensuring sensitive data or certain knowledge articles are only visible to authorized roles.)	hd.egain.com egain.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	eGain provides AI governance features out of the box. The solution maintains real-time audit trails of AI-driven interactions for transparency. It also lets companies enforce compliance rules – for instance, admins can define non-editable legal/compliance script text that the AI cannot alter, ensuring required disclosures or wording stay intact. These features help audit AI conversations and ensure they meet regulatory standards.	https://www.egain.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	eGain's virtual assistant is designed to handle common questions end-to-end. Upon deployment it can immediately perform tasks like greeting users, answering FAQs (e.g. order tracking or return policy queries), guiding users through self-service flows, and even conducting simple transactions or site navigation tours. Only if the bot cannot handle the inquiry will it escalate to a live agent, which offloads the mundane inquiries from human agents.	https://hd.egain.com/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Yes. eGain's AI uses customer context and history to personalize interactions. The system can consider a user's past interactions, purchase history, account status, and even current sentiment to determine the next best action or recommendation. In practice, this means the virtual assistant can suggest relevant products or solutions tailored to that specific customer's profile (when such data integration is in place).	https://www.egain.com/

May 2025 CX-Leader Preference Map for eGain

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	eGain includes a full analytics hub for real-time and historical reporting on its conversational AI. Managers get dashboards to monitor KPIs like session outcomes and customer feedback in real time. For example, eGain's reporting tool provides live access to all chatbot dialogs and can produce graphical reports on things like customer survey ratings, usage patterns, and areas for improvement. These analytics help track metrics such as resolution rates and customer satisfaction; (specific metrics like "fallback" can be derived from the dialogs where the bot couldn't answer and had to escalate).	https://hd.egain.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	No clear evidence. eGain's documented success metrics focus on customer service efficiency and experience (call deflection, First Contact Resolution, NPS, etc.), rather than eCommerce financial KPIs. For instance, case studies highlight improvements in service metrics – FCR +37%, NPS +30 points, etc. – but there is no mention on eGain's site of tracking Average Order Value or upsell conversion lifts from the chatbot. Thus, such eCommerce KPI impacts are not explicitly documented.	https://www.egain.com/

8. Roadmap & Future Innovations

Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Absolutely. eGain has introduced AssistGPT™, a generative AI assistant integrated into its Knowledge Hub, which automates content creation and can produce conversational answers using large language models. The platform also supports voice-enabled AI (it can do text-to-speech and speech recognition for voice interactions) to power voice bots and voice commerce scenarios. These moves show eGain is actively investing in next-gen AI capabilities for both customers and agents.	egain.com egain.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Yes. eGain delivers a "whole product" service approach, including post-deployment optimization. They offer managed services for content and AI maintenance – eGain's team can help with ongoing knowledge base updates, AI re-training/tuning, and configuration adjustments as the client's business evolves. In addition, they conduct periodic value assessments and have a defined methodology (the eGain Knowledge Method™) to continuously align the AI solution with new products, policies, and best practices.	egain.com egain.com

May 2025 CX-Leader Preference Map for eGain

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Yes. eGain has a full suite of professional services to ensure ongoing success. This includes business consulting to adjust strategy, training programs for users (via eGain University and Knowledge Academy courses), and managed services for operational support. They work with customers through regular reviews (quarterly operational and annual executive reviews are part of their methodology) to adapt the solution for organizational changes, new use cases, or seasonal demand surges.	egain.com egain.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Yes. eGain's cloud platform comes with strict SLA guarantees. For example, the eGain Cloud AlwaysOn™ service offers a 99.9% uptime SLA, with virtually no monthly downtime, to meet mission-critical availability needs. Enterprise customers also receive dedicated support with defined response times as per eGain's support policy. In short, eGain backs its AI solutions with reliability and performance commitments comparable to its overall customer engagement SLA guarantees.	https://www.egain.com/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Yes. eGain's pricing model is designed to be flexible and scalable. They emphasize cloud-based subscriptions that can accommodate volume swings. Notably, eGain has helped BPO/outsourcer clients deal with unpredictable contact volumes through flexible pricing approaches. This suggests eGain's proposals can scale with seasonal demand (e.g. higher usage periods) without punitive costs, and pricing terms are made clear up front.	https://www.egain.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	eGain's enterprise proposals are transparent and itemize all such costs upfront – they do not hide implementation or consulting fees (eGain has no separate setup or integration charges), and clients praise its "transparent pricing" and accurate quotes.	https://www.trustradius.com/ https://www.gartner.com/

Vendor Deep Dive

IBM

VOX Score	94.78 / 100
Coverage	19 / 20 questions "Yes"
HQ	Armonk, New York, NY
Website	www.ibm.com

Talk to IBM: jimmy.king.jr@ibm.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for IBM Watson Assistant

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Watson Assistant can be configured to inform users that it is an AI virtual agent. In line with IBM's transparency principles, IBM encourages clearly disclosing when AI – rather than a human – is responding. Note from vendor: We have ability for both notifications and guided activies at the initiation of the customer's interation with the AI Assistant. This can be both text as well as push buttons.	https://www.ibm.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	IBM watsonx Assistant is designed for enterprise compliance. It supports data privacy measures (e.g. GDPR support for data deletion) and secure data handling. IBM provides governance tools and configurations to help meet requirements like GDPR "right to be forgotten" and obtaining user consent when needed. Note from vendor: Data handling requirements would be collected at the beginning of the installation and configuration cycles to enable future actions like "being forgotten". Just because a platform supports this capability doesn't mean the vendor has engineered the solution for it. Our teams know how to ask the right quesitons and configure accordingly.	https://www.ibm.com/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Watson Assistant can monitor user satisfaction signals during a conversation. For example, it can detect when its answer confidence is low or when a user is unsatisfied and then trigger appropriate actions (such as escalation). IBM also supports integrating sentiment analysis (Tone Analyzer) to gauge frustration in real time. Note from vendor: The next logical step after we detect frustration is to route accordingly. We will be keen to understand how you will handle escalations when our sentiment analysis recognizes a frustrated tone.	https://www.ibm.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Watson Assistant supports smooth live-agent handoffs. The system can escalate to a human agent when the user requests a human or if the AI determines escalation is needed. Users are able to opt out to a human at any time, and Watsonx Assistant will transfer the chat context to a live agent seamlessly.	https://www.ibm.com/

May 2025 CX-Leader Preference Map for IBM Watson Assistant

3. Efficiency & ROI	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	IBM provides an analytics dashboard for Watson Assistant that tracks conversation outcomes. These reports allow organizations to measure AI impact on support KPIs – for example, how many inquiries were handled by the bot (deflected from agents) and improvements in resolution rates or handle times due to the virtual agent.	https://www.ibm.com/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	IBM's conversational AI can function in an agent-assist mode. Watson Assistant can perform real-time knowledge lookups (using Watson Discovery or similar) and provide suggested answers or relevant information to human agents during a call/chat, helping agents respond faster and more accurately. Note from vendor: Knowledge lookups, RAG and GenAI are some of the most interesting part of these projects as we are moving beyond Chatbots to AI Assistants and Agentic structures in these solutions. Whether our user is the end customer or an internal-employee users, the richness of AI search and response has been a big reason for the success of our solutions.	https://www.ibm.com/

4. Implementation & Integration Realities

	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	IBM offers guidance and reference architectures for complex integrations. Best practices are documented (e.g. using a middleware layer or APIs) to connect Watson Assistant with legacy systems, CRMs, eCommerce platforms, etc. IBM's integration guides outline how to pass information between the chatbot and multiple backend systems reliably. Note from vendor: The integration capabilitiies in our AI solutions, known as skills and tools, are an AI packaging of the hundreds of application adapters that IBM has deployed via application integration projects over many years. Many CRM, eCommerce, ERP, Policy Management, and other core systems.	https://medium.com/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Watsonx Assistant supports real-time integrations with business systems. It provides pre-built connectors and APIs to link with popular eCommerce and CRM platforms, enabling the assistant to fetch up-to-date customer data during conversations. This allows the AI to use unified customer info for personalization in near real time. Note from vendor: For real time and near-real time we are generally implementing some combination of API calls, SDK calls, message queue/topic integration, streaming/kafka integration, or other generic integration such as a raw http message call. Any of these are support with our skills and tools scaffolding, including the packaging of a customer-defined integration.	https://www.ibm.com/

May 2025 CX-Leader Preference Map for IBM Watson Assistant

5. Data Security & Privacy	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	By default, Watson Assistant can retain conversation logs (configurable for privacy). IBM provides role-based access controls for its assistant platform: administrators can restrict who can view or edit bots and their data. Only authorized team members (per their role/permissions) can access sensitive conversation records or bot settings. Note from vendor: Our platform includes underlying secure cloud object storage. We will be interested in how you do IAM (Identity and Access Management) today as well as how that maps to roles and visibility. The activities related to Fine grained auth (FGA) and course grained auth (CGA) are part of what differentiates IBM as enterprise-ready AI vendor.	https://www.ibm.com/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	IBM includes features to support auditing and compliance of AI interactions. Watson Assistant maintains an audit trail of changes (to track updates to the bot) and IBM's platform adheres to industry security/compliance standards (ISO, SOC2, GDPR, etc.), which facilitates auditing usage of the AI. These tools help ensure customer interactions remain compliant and reviewable.	https://www.ibm.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Watson Assistant can be implemented to handle routine inquiries end-to-end through integration with back-end systems. For example, it can help users track an order shipment, process a return, or provide product info/recommendations without human intervention, thereby offloading these common tasks from live agents. Note from vendor: In addiitonal automation, we also have the ability for conversational recall. Therefore we can pick up where we left off assuming we have knownledge fo the current user. If this is someone who is logged in as referenced in section 5 above we can do a lot of personalization.	https://www.ibm.com/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	IBM's virtual assistant is capable of personalized recommendations when integrated with customer data. It can use a customer's past purchases or preferences to suggest relevant products or next best actions. In retail use cases, Watson Assistant delivers highly personalized, context-aware shopping assistance to users across channels. Note from vendor: Similar to the automated inquiries, we can use historical search behavior to pre-tune answers. Beyond AI, our team has a significant amount of experience in eCommerce web, mobile, kiosk, as well as Order Management and ERP. For us this mixture of AI with your CRM and other systems is what will create the rich experience you are looking for.	https://www.ibm.com/

May 2025 CX-Leader Preference Map for IBM Watson Assistant

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Watsonx Assistant provides real-time dashboards for key chatbot metrics. The built-in analytics can show metrics like user satisfaction (e.g., via feedback or sentiment), fallback/deflection rates, and other conversation performance indicators. These reports update as interactions occur, allowing ongoing monitoring of the AI's effectiveness. Note from vendor: This question implies a mix of eCommerce eStores, Order Management, and AI Assistants. Our solution typically assumes there is an eCommerce backend where the cart "lives". There is nothing that prevents us from tracking at the AI interaction level, but we would we keen to dive into the overall picture of your CRM and eCom environments to decide if you truly want this kind of functionality live in the AI Assistant level rather than your eCom or CRM.	https://www.ibm.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	IBM's conversational AI platform itself focuses on conversational metrics rather than business KPIs. It does not natively calculate eCommerce KPIs (like AOV or conversion rates) within the tool. Measuring those outcomes would be done by analyzing data from eCommerce systems in conjunction with Watson Assistant interaction data (outside the assistant's built-in analytics).	https://www.ibm.com/

8. Roadmap & Future Innovations

Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	IBM is continuously innovating its conversational AI. Watsonx Assistant now leverages advanced large language models and retrieval augmented generation for more natural, generative responses. IBM also offers agentic AI through watsonx Orchestrate (to automate multi-step tasks), and the assistant supports voice interfaces for voice-driven commerce and customer service. Note from vendor: The rate of development of new AI toolkits, Agentic Frameworks, AI Orchestration, Tools/Adapters is very fast. IBM is innovating and releasing new AI features on a continuous basis.	https://www.ibm.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	IBM supports continuous improvement of the AI. Watson Assistant can be retrained or tuned on an ongoing basis as new data or products emerge. The system captures feedback (e.g., unresolved queries or escalations) which can be analyzed to update intents or the underlying model. IBM also offers services to help retrain and optimize the assistant so it stays up-to-date with business changes. Note from vendor: This is very interesting question that should provide the basis of a conversation involving topics of training, embedding, indexing, and the lifecycle of flushing and re-indexing. The lifecyle of MLOps and AIOps involve a lot more than most people are thinking about when they think of an AI Assistant. Your question is excellent, well informed, and deserves a substantial conversation if we are selected for the next round of your RFP process.	https://www.ibm.com/

May 2025 CX-Leader Preference Map for IBM Watson Assistant

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	IBM provides ongoing consulting and support services for Watson Assistant deployments. Through IBM Consulting or Expert Labs, clients can receive continuous training, tuning, and strategy support to adjust their chatbot as their business needs change (for example, expanding to new use cases or scaling up for seasonal demand). Note from vendor: We offer both managed support, managed application development, quickstart, full implementation, and IT advisory services. We can support both First in Enterprise (FIE) as well as additional functionality on existing AI systems.	https://www.ibm.com/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	IBM offers enterprise-grade SLAs for Watsonx Assistant. For instance, an Enterprise plan can include a 99.9% uptime availability guarantee for the assistant service. The platform is built with high availability and multi-zone redundancy to ensure consistent performance, and IBM provides responsive support aligned with those SLA commitments. Note from vendor: IBM Cloud is the source of SLAs on the platform. From a services perspective, we support the ability to "chase the clock" on a 24x7 basis.	https://www.ibm.com/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	IBM Watsonx Assistant pricing is usage-based and designed to scale with your needs. IBM publishes clear pricing options for different usage levels, and the solution can handle low to high volumes (seasonal spikes) without requiring a new contract each time. This flexibility helps avoid unexpected costs, as pricing for higher volumes or overages is predefined in the subscription model. Note from vendor: Fees and usage are delivered via cloud dashboards, similar to most cloud account management you would see in the industry. The spikes in an AI assistant occur in two ways. One is in the initial data load and subsequent data updates. Those are usually a known, predictable number of documents or data items. The second type of spike usually results from the queries that result from AI Assistant interactions. That can be harder to predict, but the platform allows for flexible scaling. Still we are careful to help customers forecast as well as possible.	https://www.ibm.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	IBM provides transparency in its proposals. All anticipated costs – including software subscription, implementation/integration effort, optional professional services, and future expansion (such as adding channels or features) – are laid out for clients. IBM's pricing documentation and proposals clearly itemize these components so that there are no surprise fees. Note from vendor: Cloud costs are clearly defined in the dashboards. Professional services can be packaged in such as way that we mitigate spikes and overages, which is generally managed services. For hourly services (advisory, architecture, etc) we can bundle them or else we can put limits on them to avoid expansion surprises.	https://www.ibm.com/

Vendor Deep Dive

→ Pypestream

VOX Score	95.40 / 100
Coverage	19 / 20 questions "Yes"
HQ	New York, NY
Website	www.pypestream.com

Talk to Pypestream: www.pypestream.com

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Pypestream

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	Pypestream's platform documentation does not indicate a built-in automated disclaimer to end-users. Interactions begin with the Pypestream AI chatbot handling queries, but any notice that it's a bot would have to be configured by the business. In other words, while Pypestream enables AI-driven chats, it does not explicitly mention an automatic disclosure feature identifying the agent as AI.	https://www.pypestream.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Pypestream is designed with compliance in mind. The platform adheres to major data protection standards like GDPR and HIPAA, ensuring proper handling of personal data. For example, Pypestream supports data encryption and even allows optional data redaction and auto-deletion of chat transcripts (e.g. 30-day retention) to facilitate privacy requirements. These features help clients meet "right to be forgotten" and other regulatory obligations.	pypestream.com pypestream.com

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Pypestream's AI monitors customer sentiment in real time. Its chatbots have advanced sentiment analysis capabilities that gauge user emotions during a conversation. This means if a customer grows frustrated or upset, the system can detect those signals (via tone or repeated queries) and adjust responses or take action accordingly. This emotional intelligence is built into the platform to make interactions more empathetic and effective.	https://www.pypestream.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Seamless bot-to-human handoff is a core Pypestream capability. If the AI assistant cannot resolve an inquiry or a user requests a human, the conversation escalates to a live agent without disruption . Pypestream's Contact Center is built to smoothly transfer context, so the agent sees the chat history and user intent. This ensures that frustrated users or those who prefer a human agent can be routed to one easily, maintaining a positive experience.	https://www.eweek.com/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Pypestream provides robust analytics to measure AI impact on support KPIs. Its dashboard (Pype Manager) tracks performance metrics like self-service containment/deflection rates and resolution times in real time. In fact, Pypestream showcases outcomes such as increased call deflection and higher first-contact resolution in client case studies (e.g., Gulf Air saw greater call deflection and customer satisfaction with Pypestream). These metrics allow businesses to quantify reductions in handle time and improvements in resolution due to the AI.	https://www.eweek.com/ https://www.pypestream.com/

May 2025 CX-Leader Preference Map for Pypestream

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	Pypestream's platform documentation does not indicate a built-in automated disclaimer to end-users. Interactions begin with the Pypestream AI chatbot handling queries, but any notice that it's a bot would have to be configured by the business. In other words, while Pypestream enables AI-driven chats, it does not explicitly mention an automatic disclosure feature identifying the agent as AI.	https://www.pypestream.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Pypestream is designed with compliance in mind. The platform adheres to major data protection standards like GDPR and HIPAA, ensuring proper handling of personal data. For example, Pypestream supports data encryption and even allows optional data redaction and auto-deletion of chat transcripts (e.g. 30-day retention) to facilitate privacy requirements. These features help clients meet "right to be forgotten" and other regulatory obligations.	pypestream.com pypestream.com

2. Consumer Trust & Frustration

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Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Pypestream's AI monitors customer sentiment in real time. Its chatbots have advanced sentiment analysis capabilities that gauge user emotions during a conversation. This means if a customer grows frustrated or upset, the system can detect those signals (via tone or repeated queries) and adjust responses or take action accordingly. This emotional intelligence is built into the platform to make interactions more empathetic and effective.	https://www.pypestream.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Seamless bot-to-human handoff is a core Pypestream capability. If the AI assistant cannot resolve an inquiry or a user requests a human, the conversation escalates to a live agent without disruption. Pypestream's Contact Center is built to smoothly transfer context, so the agent sees the chat history and user intent. This ensures that frustrated users or those who prefer a human agent can be routed to one easily, maintaining a positive experience.	https://www.eweek.com/

3. Efficiency & ROI

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Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Yes – Pypestream's Contact Center includes AI assistance for human agents. The platform automates routine tasks and surfaces relevant data or suggested replies to agents in real time. Agents can see the context of the bot conversation and even use prepared or AI-recommended responses (canned messages) to handle queries faster. This AI-driven agent assist offloads simple work and provides quick knowledge lookups, allowing live agents to focus on complex issues more efficiently.	https://www.pypestream.com/ https://www.eweek.com/

May 2025 CX-Leader Preference Map for Pypestream

	Yes/No	Details	Source(s)
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Yes – Pypestream's Contact Center includes AI assistance for human agents. The platform automates routine tasks and surfaces relevant data or suggested replies to agents in real time. Agents can see the context of the bot conversation and even use prepared or AI-recommended responses (canned messages) to handle queries faster. This AI-driven agent assist offloads simple work and provides quick knowledge lookups, allowing live agents to focus on complex issues more efficiently.	https://www.pypestream.com/ https://www.eweek.com/

4. Implementation & Integration Realities

	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Pypestream was built to integrate into complex enterprise environments. It offers open APIs and connectors to tie in legacy or third-party systems, and Pypestream publishes guidance on integrating with CRMs, ERPs, eCommerce platforms, etc.. For example, the platform easily hooks into backend systems like Guidewire or Shopify and CRM tools like Salesforce. Pypestream's documentation and services (PypePro team) provide best practices to streamline these multi-system integrations with minimal disruption.	https://www.eweek.com/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Yes. Pypestream supports real-time integrations with popular CRM and commerce systems to pull in customer data during chats. The platform is designed to connect with CRMs, customer databases, CDPs and more, so the AI always has up-to-date profile and order information. This unified data approach enables personalized interactions – for instance, tying into eCommerce inventory or CRM purchase history on the fly to personalize product recommendations. Integration is seamless, ensuring the bot's responses reflect the latest customer info across channels.	https://www.pypestream.com/ https://www.eweek.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Pypestream does store conversation data on behalf of its clients, with strong security. Chat transcripts of each session are saved (encrypted and tenant-isolated) and made accessible to the client for review. The platform also provides role-based access controls for these records: administrators can assign user roles (admin, agent, etc.) with specific permissions. For example, an Agent role might only view the conversations assigned to them, while admins can access full logs. This ensures that sensitive customer chat data is only visible to authorized roles.	https://www.pypestream.com/ https://developers.pypestream.com/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Yes, Pypestream includes features to support auditing and compliance for AI-driven chats. All conversations are automatically logged in detail (with transcripts and metadata), and Pypestream enables secure access to these logs (e.g. via a reporting API) for audit purposes. The Contact Center tooling also emphasizes compliance – for instance, it can automate case logging and ensure regulatory adherence during interactions. These capabilities let companies review bot-human conversations, verify they meet compliance standards, and document interactions for audits.	https://www.pypestream.com/

May 2025 CX-Leader Preference Map for Pypestream

6. Improving Self-Service & Deflection	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Absolutely. Pypestream's core use-case is end-to-end automation of routine queries. Its MicroAgents (task-specific AI bots) handle frequent requests like checking order status, processing returns, tracking shipments, or providing product info without human intervention. The platform's chatbot can complete these workflows (even doing things like account lookups or cancellations) on its own. By resolving such common inquiries automatically, Pypestream significantly lowers the volume of issues that ever reach live agents.	https://www.pypestream.com/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Yes. Pypestream leverages customer data to personalize interactions, including product recommendations. It can integrate with purchase history or preferences via Customer 360 data integration, then deliver tailored product suggestions through the chatbot. In fact, Pypestream highlights a "fully automated product recommendation" solution for retail, where the AI recommends products in real time based on user profile and behavior. This dynamic personalization encourages customers to self-serve (for example, discovering relevant products or upsells) within the chat experience.	https://www.pypestream.com/ https://www.pypestream.com/

7. Measurement & Reporting

	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Pypestream provides real-time dashboards for all key chatbot metrics. Its proprietary Pype Manager dashboard allows clients to monitor performance and quality in real time. Through this interface, businesses can see metrics like user satisfaction/CSAT scores, fallback/unanswered rates, containment rates, conversion events, and more. The platform's analytics can even correlate AI interactions to outcomes (like cart abandonment or drop-off points), giving a live view of how the conversational AI is impacting customer behavior and KPIs.	https://www.eweek.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	Yes. Pypestream's analytics extend to business outcomes in eCommerce. The platform can track sales and retention metrics that result from AI engagements. For example, one client's implementation turned their support chat into a revenue channel – generating about 4,000 new device sales via Pypestream's chatbot upsells. Pypestream also helped drive user retention for that client by engaging customers with proactive support, as noted when the brand "continued to collaborate with Pypestream" to boost user growth and retention. These examples show Pypestream measures and delivers improvements in conversion and churn metrics attributable to the AI interactions.	https://www.pypestream.com/ https://www.pypestream.com/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Pypestream is at the forefront of next-gen conversational AI. It uniquely merges traditional automation with generative AI to create more natural, on-brand responses. Additionally, Pypestream specializes in "agentic AI" – evolving chatbots into autonomous agents. A recent Pypestream update describes a System of Agents approach, with multiple AI agents collaborating like a human team to handle complex tasks. Pypestream explicitly positions itself as delivering custom agentic AI solutions, treating AI bots as integral workforce members rather than just simple tools. These innovations, along with support for voice and multimodal channels, show Pypestream's commitment to next-gen AI capabilities.	https://www.pypestream.com/ https://www.pypestream.com/

May 2025 CX-Leader Preference Map for Pypestream

	Yes/No	Details	Source(s)
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Yes. Pypestream offers continuous optimization and training as a service throughout the engagement. Through its PypeX (Center of Excellence) and Customer Success teams, Pypestream works with clients on ongoing bot improvements. The platform supports continuous learning – for instance, it encourages using human feedback to retrain and update the chatbot's NLP models over time as new intents or product lines emerge. In practice, Pypestream will regularly tune the AI (both the conversational flows and underlying models) to reflect brand updates, new offerings, and evolving compliance requirements, ensuring the AI stays accurate and effective.	https://www.pypestream.com/ https://www.pypestream.com/

9. Engagement Model & Support

	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Pypestream provides ongoing services and partnership to evolve the solution over time. They don't "set and forget" – a dedicated Customer Success and solutions team is assigned to each enterprise client for continuous support and strategy. For example, one customer case notes that the client "continued to collaborate with Pypestream" as their needs changed, repurposing the chatbot for new goals like user retention and revenue generation. Pypestream's PypePro Services and Center of Excellence are in place to offer training, tuning, and consulting whenever the business introduces new use cases or faces seasonal demand spikes, so the AI assistant is always up-to-date and effective.	https://www.pypestream.com/ https://www.eweek.com/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Yes. Pypestream is an enterprise-grade SaaS platform that contracts uptime and support SLAs. The company has a public status page for transparency on uptime and maintenance, and meets stringent reliability standards (e.g. SOC 2 audited, GovCloud/FedRAMP-ready infrastructure for high availability). Within the solution, Pypestream even lets clients track and optimize SLAs for response times to end-users. In practice, this means Pypestream will commit to uptime percentages and responsive support in agreements, ensuring the AI service is reliably available and performant for customers at scale.	https://support.pypestream.com/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Pypestream's pricing model is designed to be transparent and scale with usage. For instance, the Contact Center service is listed at a clear per-agent monthly rate up to a certain volume, and then switches to usage-based pricing for higher volumes. This indicates flexibility for fluctuations (you pay based on active agents or usage). Moreover, because the AI can handle surges in inquiry volume without additional per-interaction charges (one bot handles many chats), businesses can handle seasonal spikes without incurring unpredictable costs. Pypestream emphasizes cost stability at scale, so customers aren't surprised by hidden fees during peak seasons.	https://www.pypestream.com/ https://www.pypestream.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Yes. Pypestream provides clear upfront scoping of implementation and expansion costs in its proposals. All components – from initial setup to ongoing professional services – are defined contractually so clients know the TCO. For example, if a customer expands to a new channel or significantly increases usage, Pypestream uses a "pricing based on usage" model that is discussed in advance rather than surprise fees. The company's AWS Marketplace listing notes that pricing is tied to contract terms with specified usage quantities, underscoring that everything from deployment services to any future scale-up is transparently laid out in writing.	https://www.pypestream.com/ https://aws.amazon.com/

Vendor Deep Dive

Siena AI

VOX Score	95.40 / 100
Coverage	19 / 20 questions "Yes"
HQ	New York, NY
Website	www.siena.cx

Talk to Siena AI: andrew@siena.cx

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Siena AI

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	Siena's platform does not advertise a built-in automatic disclosure. It is typically up to the business to introduce the AI (e.g. via the chatbot greeting or persona name). However, Siena encourages transparency – for example, best practices include clearly informing customers during an AI-to-human handoff. Brands can configure Siena's AI persona to clarify it's a virtual agent, but this is not an out-of-the-box automated feature.	https://www.siena.cx/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Siena is designed with compliance in mind. It is officially GDPR and CPRA compliant and also SOC 2 certified, which means it meets strict data privacy/security standards. This includes proper handling of personal data and honoring deletion requests (right to be forgotten) via its data processing agreements. While "explicit consent" for bot usage is managed by the business's own customer-facing policies, Siena advocates transparency in AI interactions (e.g. advising users when transferring to a human), aligning with consent best practices. Note from vendor: Siena is also HIPAA compliant.	https://www.siena.cx/ https://www.siena.cx/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Siena's AI monitors customer sentiment and other experience signals during conversations. The platform uses a Conversation Experience Score (CXP) metric that evaluates each AI-handled conversation on factors including customer sentiment shifts and emotional tone. In practice, Siena's AI can detect if a user is getting frustrated or unhappy – for instance, it will acknowledge frustration in messages ("that must be frustrating") as part of its empathetic response model. These capabilities indicate Siena is tracking sentiment in real time and can respond appropriately. Note from vendor: Siena mirrors the behavior of the customer.	https://support.siena.cx/ https://www.siena.cx/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Siena supports seamless AI-to-human handoffs. Its intelligent routing will transfer a conversation to a live agent whenever Siena cannot fully assist or when certain triggers occur. For example, Siena's Collaborative AI feature means if the AI is stuck, it automatically routes the query to the correct human agent, along with context on why it's escalating. Businesses can also define rules so that if a customer types "agent" or appears frustrated, Siena immediately offers to hand over. Siena's best practices include transparent communication during handoff (e.g. the AI saying it will escalate to a team member), ensuring a smooth transition.	https://www.siena.cx/ https://www.siena.cx/

May 2025 CX-Leader Preference Map for Siena AI

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Siena provides robust analytics on AI performance and impact. In the Siena dashboard you can see the Automation Rate (the percentage of conversations fully handled by AI) – effectively the deflection rate from human agents. Real-world results show Siena automating ~80% of all tickets and resolving them 90% faster than traditional support, indicating major reductions in handling time. The platform also tracks resolution outcomes; because Siena strives to solve issues (not just deflect), a high first-contact resolution rate is achieved by the AI. These metrics are available to demonstrate ROI (e.g. Siena's ROI calculator highlights cost savings and deflected volume). Note from vendor: Also, average CSATs across our entire customer base is over 90%.	https://support.siena.cx/ https://www.siena.cx/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Siena offers an AI Copilot for customer service agents. Siena Copilot is a generative AI assistant that lives in the helpdesk interface to help human agents craft replies faster. Agents can input a short prompt or context, and Copilot will instantly generate a suggested response that aligns with the brand voice, saving the agent time in formulating answers. This "agent assist" can pull in relevant knowledge (from the same sources the AI uses) to ensure responses are accurate. In short, Siena's Copilot provides real-time recommended responses and edits, acting as a productivity booster for live staff. Note from vendor: We also have another AI Assistant that helps users build automations by describing in plain english to it their intent. Siena will then go and write the guidance as well as automatically add the actions that need to be taken in the workflow. The user only needs to hit save and test as a next step. Read more about the AI assistant here.	https://www.siena.cx/blog/

May 2025 CX-Leader Preference Map for Siena AI

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Siena provides a flexible Custom Integrations framework with documentation on how to connect to virtually any external system. The Siena support docs include a step-by-step guide for setting up custom API integrations – users can configure HTTP methods (GET, POST, PUT, etc.), endpoints, and authentication (API keys) to tie Siena into legacy or third-party systems. This means if you have multiple CRMs or bespoke databases, you can create integration "actions" for Siena to query or update those in conversations. Siena also has best practices for data integration (e.g., providing business context and connecting product catalogs) to ensure the AI has the info it needs. Note from vendor: We also offer dedicated AI Engineers who who work with enterprise clients to build custom integrations.	https://support.siena.cx/ https://support.siena.cx/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Siena comes with native integrations for many commerce and CRM platforms, enabling real-time data sync. It works out-of-the-box with modern eCommerce stacks like Shopify, subscription tools like Recharge/Skio, and helpdesks like Gorgias, Zendesk, Kustomer. Siena's integration layer (including one-click connectors) allows the AI to pull customer info (orders, loyalty status, etc.) and update records instantly during a chat. For example, Siena can fetch an order status from Shopify or update a subscription in real time as it converses. This unified data approach means AI interactions are always personalized with the latest customer data.	https://www.siena.cx/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Yes, Siena stores conversation transcripts and related data in its platform (for learning and analytics), and it implements strict access controls to protect that data. Siena is SOC 2 certified, which entails strong controls on data access and governance. Internally, Siena follows a principle of least privilege: only authorized users/roles can access sensitive conversation content. The company's security documentation notes that a restricted set of personnel can grant or revoke access, and each person's access is limited to what their duties require. Likewise, customers using Siena can assign roles in their helpdesk or Siena dashboard – for example, an admin could review transcripts, but a basic agent might only see what's necessary to handle live escalations.	https://www.siena.cx/ https://www.siena.cx/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Siena includes features to audit AI-driven conversations and ensure they meet quality and compliance standards. Every AI conversation is logged and can be reviewed in the Analytics section, which provides a CXP score per interaction (covering CSAT, accuracy, sentiment, etc.) for quality auditing. Additionally, Siena has an AutoQA mechanism: if the AI cannot handle a query, it tags the conversation (with a "siena-follow-needed" flag) and escalates to a human, leaving an event trace ("Routed to team") in the ticket. This ensures no conversation falls through the cracks and that supervisors can easily find and inspect cases where the AI struggled. Moreover, Siena's compliance certifications mean clients can request formal audits or reports; the platform even allows customers to audit Siena's data processing practices as part of GDPR/SOC2 obligations.	https://support.siena.cx/ https://support.siena.cx/

May 2025 CX-Leader Preference Map for Siena AI

6. Improving Self-Service & Deflection	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Siena is built to fully automate the common eCommerce support tasks. It can handle order status questions (providing tracking info, delivery updates, etc.), process returns or exchanges, and answer product questions without human help. For example, Siena can automatically give real-time shipping updates or change a delivery address during a chat, and it can guide a customer through a return or refund process end-to-end. The platform's AI Flows allow it to execute actions like checking inventory or creating a replacement order by interfacing directly with systems like Shopify in real time. It also offers product recommendation capabilities as part of answering sales questions. All of this automation offloads a huge volume of repetitive tickets from live agents.	https://www.siena.cx/ https://www.siena.cx/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Siena's AI leverages available customer data to personalize its responses and recommendations. If connected to your CRM or eCommerce platform, Siena knows the customer's order history, profile info, and browsing context, allowing it to tailor suggestions. The Siena team notes that one of the best uses of AI is to suggest products or next steps based on customer history and preferences, as long as the AI is fed the proper data. Siena allows integration of product catalogs and knowledge sources (like Yotpo reviews or FAQs) so the AI can recommend items in context. For example, if a customer asks "Which product is best for me?" Siena can consult the product database and the customer's past purchases to give a targeted recommendation. (Siena's Generative Answers feature specifically pulls from sources like product catalogs to deliver the right info on the fly.) These personalized recommendations are provided within the self-service interaction, boosting upsell and cross-sell opportunities. Note from vendor: Also, powered by Siena Memory, Siena blends each shopper's order history with the rich preferences it has stored—size, color, skin type, even signals like an upcoming trip—to generate real-time product recommendations inside the chat. When a customer asks "What should I get next?", the agent consults those memories, pulls live catalog and inventory data from your storefront, CRM, or CDP, and presents the best-fit items—be it the latest earth-tone tee in size M, a fragrance-free vitamin C serum for combo skin, or a travel kit guaranteed to arrive before their vacation. The result is a self-service experience that feels truly personal, drives higher upsell and cross-sell, and requires zero manual tagging once the data connections are in place.	https://www.siena.cx/ https://www.siena.cx/

7. Measurement & Reporting

	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Siena includes a real-time dashboard and analytics suite for all key conversational AI metrics. Users can log into the Siena Dashboard to see stats like Total Conversations, Automated Conversations, and Automation Rate (percentage handled by AI) filtered by channel or time period. Importantly, Siena provides a metric for fallbacks: the "Routed" percentage (how often conversations were handed to humans) is tracked so you can monitor the AI's containment rate. For satisfaction, Siena doesn't rely only on generic CSAT surveys – it computes the CXP score for each interaction, which incorporates customer sentiment and resolution success to gauge satisfaction in real time. All these metrics are updated live in the dashboard. (Cart abandonment might not be a direct dashboard widget, but Siena does track conversion-related metrics via its ROI calculator and "Siena Driven Revenue" figures.)	https://support.siena.cx/ https://support.siena.cx/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Siena is very focused on eCommerce outcomes and provides insight into those KPI impacts. The platform has been shown to drive additional sales – for instance, merchants report that Siena's helpful, personalized answers have inspired customers to make purchases they might not have otherwisesiena.cx. Siena's own ROI tools measure AI-driven revenue (tracking how many orders or dollars the AI helps generate)siena.cx. Case studies describe turning support into a "revenue center," with upsells and higher conversion rates attributed to Siena's AI siena.cx. While Average Order Value (AOV) and churn are ultimately measured on the commerce side, Siena's influence on those is evident through improved customer experience and proactive suggestions – happier, well-served customers are less likely to churn and more likely to buy more, which is exactly what Siena's users have observed (some even credit Siena for boosting retention). Note from vendor: Also, as of April 2025, Siena has deployed their new Sales, Voice and Insights Agents as part of their ecosystem of superintelligent agents that build relationships.	siena.cxsiena.cx

May 2025 CX-Leader Preference Map for Siena AI

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Yes – next-gen AI is core to Siena's value. Siena's agent is powered by generative AI (LLMs) to produce human-like, empathetic responses, and the company continuously adds new capabilities. They have introduced AI Personas (to fine-tune the AI's style by channel) and a powerful Cognitive Reasoning-Based Engine (CORE) that enables more agentic AI behavior. Siena's AI can autonomously execute complex multi-step tasks that typical bots cannot. For example, it can be given a goal like "edit a subscription and send a replacement" and it will perform all necessary actions across systems to achieve it (pulling data from Shopify, asking the user for clarification, updating the order). This kind of agentic capability—taking action on behalf of users—is already in production. Siena also supports 100+ languages and omnichannel (email, chat, SMS, social), and while their materials don't explicitly mention voice yet, the platform's rapid innovation suggests voice integration could be on the roadmap. Overall, Siena is at the cutting edge of conversational AI, blending generative dialog and autonomous problem-solving.	https://www.siena.cx/ https://www.siena.cx/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Yes – Siena's solution is not "set and forget"; it actively improves and is supported over time. The AI learns from new interactions – for example, if Siena encounters a query it can't answer and routes it to a human, it will later suggest how to handle similar questions in the future, effectively learning from that case. Siena also provides tools to simplify ongoing training: their Automation Assistant uses a conversational interface to help admins update the AI's workflows when policies or product offerings change, turning process documents directly into new AI rules or dialogues. In addition, customers get support from Siena's team for optimization: model performance is continuously monitored (via AutoQA and CXP metrics), and Siena's success managers will help tweak the AI's knowledge bases or persona as your business evolves. This ensures the AI stays up-to-date with your latest products, policies, and compliance requirements. Note from vendor: Our approach is multimodal and multiagent. Also, Siena learns from historical tickets of your best agents.	https://www.siena.cx/ https://www.siena.cx/

9. Engagement Model & Support

Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Yes – Siena offers ongoing customer success and consulting support throughout the partnership. Every client is paired with a dedicated Customer Success team (included as part of the service) to assist with training the AI, tuning it, and measuring its success over time. They help adapt the AI when you launch new product lines or campaigns. Siena also has a Partner Program and a user community – for instance, some brands work with certified CX consulting partners to implement and optimize Siena (as seen when Fuel Meals engaged a CX agency to deploy Siena). Siena provides training resources (webinars, an online Certification program for AI CX) to empower your team to make changes. And during peak seasons, Siena's team is on hand to ensure the AI is prepared (they can help you adjust automation rules or capacity settings). In short, continuous support and consulting are a standard part of Siena's offering to ensure the AI keeps up with your business. Note from vendor: Siena also has a Managed Services offering where we take care of the entire building, implementation, management and scaling of your AI Agents.	https://www.siena.cx/ https://www.siena.cx/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Yes – Siena can comply with enterprise-grade SLAs for availability and support. The platform's SOC 2 certification specifically addresses high standards for security and availability of the service , meaning Siena has infrastructure and processes to maintain reliable uptime. They have a publicly visible security trust page and would furnish uptime commitments in contracts. In terms of support responsiveness, Siena's Customer Success team and support engineers are in place to meet strict response time SLAs if an issue arises. (While exact SLA terms would be defined in an agreement, Siena's focus on "unparalleled service quality and reliability" indicates they are prepared to guarantee performance for their AI service. Current customers operate Siena as a mission-critical system, and Siena provides the needed reliability.)	https://www.siena.cx/ https://www.siena.cx/

May 2025 CX-Leader Preference Map for Siena AI

10. Pricing & Total Cost of Ownership (TCO)	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Yes – Siena's pricing is usage-based and designed to scale with your volume, which inherently handles seasonal fluctuations. They publish a clear pricing structure: a flat platform fee (e.g. $500/month) plus an "Automation Pack" usage charge starting at ~$0.90 per automated ticket. This per-ticket model means if your volume spikes, you pay for the extra tickets automated, and if volume drops, costs scale down – no lock-in to a higher rate. This transparency ensures there are no hidden fees; for example, there's no extra charge for additional channels or users, just the per-conversation fee. Siena even provides an ROI calculator to predict costs and savings at different volumes. In short, the pricing is very flexible and clearly communicated, accommodating seasonal peaks without surprise charges.	https://www.siena.cx/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Yes – Siena clearly discloses all components of cost upfront. The pricing page outlines: (1) the monthly platform subscription, (2) the usage-based automation fees, and (3) the included Customer Success services. There is no indication of hidden implementation fees – onboarding and training support are part of the standard package (the dedicated success team is described as "integral to your journey" with Siena). Furthermore, Siena's platform supports all channels (chat, email, SMS, social) out of the box, so adding a new channel later doesn't incur a new license cost – it's covered by the existing platform fee. Any additional professional services (if a customer wanted custom work beyond the included success program) would be discussed transparently. Overall, Siena's proposals break down costs in a straightforward way, so you can clearly see what you're paying for each aspect of the solution.	https://www.siena.cx/ https://www.siena.cx/

Vendor Deep Dive

→ Gladly

VOX Score	100 / 100
Coverage	20 / 20 questions "Yes"
HQ	San Francisco, CA
Website	www.gladly.com

📞 Talk to Gladly: hello@e.gladly.com

👥 Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Gladly

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Gladly supports adding automated notices to inform customers about AI interactions. For example, admins can configure pre-chat privacy or consent messages in the chat widget. This allows companies to explicitly disclose when an AI (Gladly Sidekick) is handling the conversation. Gladly treats AI as an "agent" role, so businesses often give the AI a bot name/profile, making it clear to customers they're chatting with an automated assistant (as a best practice).	http://connect.gladly.com
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Gladly's platform is designed with compliance in mind. It provides features to meet data privacy requirements – for instance, it supports Data Subject Requests (the "right to be forgotten"), allowing deletion of customer data including AI-generated content like conversation summaries. Companies can also obtain explicit customer consent before bot interactions by using Gladly's built-in pre-chat disclaimers or privacy notices. In addition, Gladly adheres to security standards (SOC 2, PCI, etc.), ensuring AI-driven conversations handle data appropriately. These tools help organizations use AI within regulatory guidelines.	http://connect.gladly.com/ http://help.gladly.com/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Gladly can monitor customer sentiment and detect signs of frustration in real time. Its AI-driven SupporTrends module uses advanced NLP to gather customer sentiment from chats, emails, reviews, etc., for immediate analysis. In practice, this means Gladly's system can gauge if a customer is getting upset (e.g. negative tone or repeated "unhelpful" inputs) during a live conversation. Gladly has highlighted the importance of real-time sentiment analysis in customer service – modern AI solutions (like Gladly's) "can monitor sentiment in real-time during live conversations". These capabilities allow the platform to identify frustration signals and react accordingly.	help.gladly.com gladly.com
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Gladly's solution seamlessly hands off conversations from AI to human agents whenever needed (whether due to customer frustration or request for a human). The Gladly Sidekick virtual agent is built to recognize when a human touch is required and then escalate with full context to an agent. The hand-off is smooth – the agent receives the conversation history and AI findings, so the customer never has to repeat themselves. In fact, transferring the conversation to a live agent is one of the standard "actions" that Gladly's automated Threads can perform. This ensures that if the AI isn't meeting the customer's needs or the customer prefers a human, the transition is quick and frustration-free.	smbguide.com gladly.com

May 2025 CX-Leader Preference Map for Gladly

3. Efficiency & ROI	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Gladly provides metrics and case studies demonstrating AI's impact on efficiency and ROI. The platform's reporting can break out AI-driven performance (e.g. how many contacts the AI resolved). Gladly often highlights metrics like call/chat deflection and handle time reduction: for instance, Allbirds achieved a 41% reduction in average handle time and an 87% resolution rate after implementing Gladly's complete AI solution. Another brand, Bombas, saw handle times 90% faster and an 88% resolution rate on automated cancel-order requests with Gladly, all while maintaining 99% CSAT. Real users confirm these gains – one G2 reviewer noted that after launching Gladly's AI, they were "able to decrease our contact volume", improving the customer experience by deflecting routine inquiries. These metrics show Gladly's AI measurably improves first-contact resolution and reduces workload, and they are visible through Gladly's analytics dashboards.	gladly.com g2.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Gladly includes AI-driven "agent assist" features to boost live agent productivity. Its Hero AI capabilities (included for all agents) offer things like AI-suggested response drafting and instant conversation summaries. Gladly's platform uses AI to recommend replies and next-best actions in real time to agents, pulling answers from the knowledge base and context from the customer's history. Agents can also leverage one-click AI Summaries to condense long conversations or voicemails, which saves time catching up on issues. These features act like a real-time co-pilot – for example, auto-filling customer info into messages or suggesting the best response – allowing agents to handle inquiries faster and more consistently. All of this leads to higher productivity and lower handling times, as noted in Gladly's documentation and user feedback.	gladly.com g2.com

May 2025 CX-Leader Preference Map for Gladly

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Gladly provides a well-documented approach and best practices for complex integrations. The company offers implementation packages tailored to the complexity of your environment, and it has extensive guides for integrating with legacy systems, CRMs, eCommerce platforms and more. Gladly's integration documentation shows a robust App Platform and dozens of pre-built connectors that make it easy to connect external systems. For example, they have native adapters or APIs for pulling in order data, customer info, and other CRM records in real time. Gladly's developer resources and Implementation Guides walk through how to sync data or trigger actions across systems, ensuring even legacy or multi-CRM environments can be accommodated. In short, Gladly is built to slot into a larger enterprise tech stack, with clear guidance on how to achieve a unified solution.	help.gladly.com gladly.com
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Gladly's platform integrates with major eCommerce, CRM, and customer data platforms in near real-time, enabling a unified customer view for its AI. It has out-of-the-box integrations for popular commerce systems like Shopify, Magento, BigCommerce, etc., which allow Gladly to pull customer and purchase history details directly into the conversation view. It also integrates with CDPs and data pipelines (for example, Segment and Hightouch) to sync customer data. Gladly even provides an AWS EventBridge integration for real-time routing of data events into Gladly. This means when a customer makes an update or a purchase, that information can flow instantly to Gladly's AI and agents. Because of these integrations, the AI has up-to-date, unified customer data (orders, loyalty status, preferences, etc.) to personalize interactions. The result is that whether the customer is on chat, email, or voice, Gladly's AI and agents are working off the same real-time customer context.	http://gladly.com/

May 2025 CX-Leader Preference Map for Gladly

5. Data Security & Privacy	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Gladly does store customer conversation data (every interaction is logged in a single lifelong conversation timeline for each customer). It also provides robust role-based access controls to protect that data. According to Gladly's feature overview, admins can grant or restrict access to data and features based on user roles and teams. This means sensitive conversation records or personal info can be permissioned so that only authorized staff (e.g. managers or certain departments) can view or export them. In practice, Gladly offers "advanced permissions" settings on higher-tier plans which allow fine-grained control over who can see PII, edit conversations, delete data, etc. Combined with its SOC 2 certified infrastructure, these role-based controls ensure customer transcript data is stored securely and only visible to the appropriate team members.	http://g2.com/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Gladly provides tools and practices to audit AI interactions and maintain compliance. All AI-driven conversations (through Sidekick) are saved as part of the customer's conversation history, so supervisors can review every AI/customer interaction thread via the Gladly interface. Moreover, Gladly has built-in quality control features for its AI: admins can configure the AI's behavior and the platform uses "hallucination detection" technology to ensure AI responses stay factual and on-brand. This means you can set the AI to only answer using approved knowledge base content and even flag or prevent responses that don't align with guidelines. Together, these capabilities act as an audit and compliance layer – companies can track what the AI is telling customers and be confident it's following the rules. Gladly's documentation even encourages treating the AI like an agent by monitoring its performance and training it regularly, ensuring ongoing compliance with customer service standards.	help.gladly.com gladly.com

May 2025 CX-Leader Preference Map for Gladly

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Gladly's AI Sidekick is capable of fully automating common inquiries end-to-end, significantly reducing live agent workload. Sidekick uses "Threads" (pre-defined or AI-generated conversation flows) to handle typical customer requests without human intervention. For example, it can look up order status, provide shipping updates, reset passwords, process returns/exchanges, or even handle booking changes autonomously. Gladly explicitly notes that Sidekick "doesn't stop at providing information; it takes action" – it can execute tasks like processing refunds or making reservations within the chat/call. All of this happens in a conversational manner, so the customer can self-serve for issues like "Where's my order?" or "I'd like to return an item" and get it resolved immediately by the AI. By automating these repetitive cases, Gladly frees up agents to focus on more complex, high-value interactions.	smbguide.com gladly.com
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Gladly's conversational AI can dynamically personalize product recommendations using customer data. The platform has a people-centered AI approach that takes into account each customer's past purchases and preferences (available via the unified customer profile) to make tailored suggestions. Gladly describes scenarios where the AI can proactively recommend relevant products or services – for instance, suggesting a replenishment of an item the customer bought before, or recommending an accessory that complements their recent purchase. Because Gladly's AI has real-time access to order history and possibly browsing intent (when integrated with eCommerce platforms), it can offer these personalized recommendations during the conversation. This not only helps the customer discover products on their own (boosting self-service and sales), but also enhances the service experience by making it feel truly one-to-one. In short, Gladly's AI isn't limited to FAQs – it can act as a smart shopping assistant as well.	gladly.com

May 2025 CX-Leader Preference Map for Gladly

7. Measurement & Reporting

	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Gladly provides real-time reporting and dashboards to track key conversational AI metrics. In the Gladly reporting suite (called Gladly Insights), there are specific dashboards for Sidekick's performance – including metrics like the number of Assisted Conversations, Resolution Rate by the AI, and Time Saved. For example, Gladly offers a Sidekick Dashboard that shows how your AI implementation is performing in terms of conversations handled and resolved by the bot. Managers can monitor things like AI fallback rates (i.e., how often the AI had to escalate to an agent), customer satisfaction scores (CSAT) for AI-handled chats, and even analyze trends like common topics the AI is handling. All of this is updated in real time and can be broken down by channel. Gladly's unified reporting combines both AI and agent interactions, so you can see the full picture — for instance, dashboards that combine metrics across voice, email, chat, SMS etc., are available. This real-time visibility into AI metrics (like self-service success rate, containment rate, etc.) helps businesses closely track and optimize their conversational AI's effectiveness.	help.gladly.com gladly.com
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	While Gladly's core analytics focus on customer service metrics, it does enable measurement of eCommerce KPIs influenced by AI interactions, especially through its integrations and reporting flexibility. Gladly's philosophy is to turn service from a cost center into a revenue generator, so they pay attention to outcomes like sales and retention. For example, Gladly has features like chat payments and product recommendations which directly impact Average Order Value and conversion – one client (Crate & Barrel) even generated $100k in revenue via messaging in the first week of using Gladly's chat payment feature. Such outcomes can be tracked. The platform also identifies upsell/cross-sell opportunities during service (the AI or agents are prompted with insights to boost order value). Additionally, Gladly's SupporTrends integration can analyze support conversations against outcomes like churn or repeat purchase, helping tie AI-driven service to churn reduction indicators. While specific metrics like AOV uplift from AI might not appear in a default dashboard, Gladly provides the data and hooks needed to measure those impacts. Many Gladly customers have reported higher average order values and more conversions due to more personalized, proactive service interactions (which Gladly often shares as success stories), indicating that these eCommerce KPIs are indeed tracked and improved with Gladly's AI-powered approach.	gladly.com

May 2025 CX-Leader Preference Map for Gladly

8. Roadmap & Future Innovations	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Gladly is actively developing next-gen conversational AI features, including generative AI and advanced autonomous capabilities, across all channels (text and voice). In 2023, Gladly introduced Sidekick, a generative AI and no-code automation platform aimed at delivering personalized self-service conversations at scale. Sidekick uses large language model tech to generate human-like responses from a brand's knowledge base and can even execute complex multi-step tasks (it's described as going beyond answering to actually "executing a transaction such as managing a return, processing an exchange, changing a flight, and much more"). Gladly is also innovating in voice AI – they launched Sidekick on Voice, which brings their conversational AI to phone calls with no hold times and natural language understanding. This voice AI can handle spoken inquiries, perform actions via voice (for example, cancel an order or issue a refund during a call), and then hand off to an agent if needed. Gladly's roadmap clearly emphasizes AI: the company has invested heavily (even acquiring an AI company, Thankful) to ensure their platform stays on the cutting edge of generative and "agentic" AI. Features like hallucination detection and continual learning show they're pushing into advanced AI safety and reliability improvements. Overall, Gladly is keeping pace with the latest AI trends – from GPT-powered chatbots to AI-driven voice and even proactive AI outreach – and continually enhancing these capabilities for the future.	community.execsintheknow.com gladly.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Gladly provides ongoing model tuning and support to keep its AI in sync with brand changes, new products, and compliance updates. The platform is designed for continuous learning – Gladly notes that its AI is "built to learn and improve over time, much like a human agent". Practically, this means that as you update your knowledge base (Public Answers) with new or changed information, the AI will use the latest content when responding. Gladly also allows configuration of AI behavior (you can update the AI's "Advice" and rules at any time) and employs tools like hallucination detection to ensure the AI stays factual and on-brand. In terms of services, Gladly advocates treating the AI as part of the team – they recommend regular AI training sessions where you update the AI on new product info or policy changes and review its performance. Gladly's customer success team can assist with this ongoing optimization. Through the Gladly Connect community and support, clients get guidance on tweaking AI responses and workflows whenever something in the business changes. In short, both the technology and the Gladly support resources are in place to continuously refine the AI (retraining it on real interactions, adjusting for new FAQs, ensuring compliance with any new regulations, etc.) so it remains up-to-date with your brand's current needs.	https://forethought.ai/ https://forethought.ai/

May 2025 CX-Leader Preference Map for Gladly

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Gladly offers continuous professional services, training, and consulting to adapt the AI solution as your business evolves. From the start, they have multiple implementation packages to fit different needs (from self-guided setup to high-touch onboarding). Beyond go-live, Gladly provides ongoing Customer Success and support. There is a rich Gladly Connect Learning portal with training courses and certifications for your team, ensuring you can continuously upskill agents and admins on new features or new use cases. Gladly also runs an online community and regular events (like Gladly Connect Live) where best practices are shared. For day-to-day support, Gladly's premium support (included in enterprise plans) gives you a dedicated point of contact and faster response SLAs. This means as you launch new lines of business or prepare for seasonal peaks, Gladly's team is available to help reconfigure workflows, update AI threads, and provide guidance to optimize for those changes. In reviews, customers often praise Gladly's responsiveness and hands-on support. Overall, the engagement model isn't "set and forget" – Gladly partners with clients via ongoing consulting and training so the AI and the platform continue to deliver value as things change.	help.gladly.com connect.gladly.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Gladly is able to provide reliable SLAs for uptime, support responsiveness, and performance – including for its AI features. The platform is cloud-based and built with an enterprise-grade architecture. In fact, Gladly's Superhero (enterprise) plan guarantees 99.9% uptime availability, which is a formal SLA on system reliability. They also maintain a public status page for transparency on uptime. In terms of support responsiveness, Gladly offers Premium Support for enterprise customers, which entails rapid response times and a dedicated support team (ensuring any issues, AI-related or otherwise, are addressed promptly). Gladly's performance SLAs cover things like message delivery and voice quality as well. Notably, the new AI/automation capabilities are built to scale efficiently – e.g. Sidekick on Voice is designed to handle calls with zero wait, indicating the system can scale to demand. While specific AI-response speed SLAs aren't published, the overall contract will include performance guarantees for the platform that extend to all features. Gladly's focus on enterprise clients means they are accustomed to signing SLAs that encompass uptime, support response, and security for the entire solution, giving confidence that the AI-driven interactions will be delivered reliably.	smbguide.com gladly.com

May 2025 CX-Leader Preference Map for Gladly

10. Pricing & Total Cost of Ownership (TCO)	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Gladly offers a transparent pricing model and some flexibility for volume fluctuations. Their pricing is primarily per agent ("Hero") license, with all core channels included, and they clearly outline what's included vs. usage-based. Notably, Gladly's Sidekick AI chatbot is usage-based – currently priced around $0.60 per AI-assisted conversation (with a volume commitment). This usage-based component means costs scale with actual volume, which can help accommodate seasonal spikes (you pay more when the bot handles more conversations, and less when volume drops, rather than paying for a fixed huge capacity year-round). All of these charges are communicated upfront; for example, Gladly's plan description explicitly states that Hero AI features are included in the seat price, while Sidekick conversations are an extra charge, so there are no hidden fees. Gladly's contracts can be tailored for expected volume – if you anticipate peak season loads, you can arrange the appropriate number of agent seats or bot conversation packs in advance (their team will work with you on this). Additionally, Gladly includes some "Light user" licenses for free in higher tiers (for occasional users), which is another way they provide flexibility without extra cost. Overall, the pricing structure is straightforward and Gladly is transparent about add-on costs, making it easier to predict and manage TCO even during fluctuating demand.	http://smbguide.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Gladly is clear about implementation, professional services, and expansion costs in their proposals. During the sales process, they typically outline the one-time implementation fee or package (if any) and what it includes. In fact, Gladly publicly mentions offering a suite of implementation packages based on complexity, which implies these options and costs are well-defined (e.g. a standard implementation vs. a custom enterprise implementation). Ongoing professional services or training offerings (such as custom workflow configuration, integrations, or on-site training) would likewise be presented transparently as optional line items. As for adding new channels or expanding usage, Gladly's pricing plans already bundle all major channels (email, chat, SMS, voice) – you don't pay per channel, so no surprise fees there. Any limitations (like number of knowledge base sites or inboxes) are clearly stated in the plan details. For example, the higher-tier plan includes additional knowledge base instances and advanced features, which are spelled out in advance. Should you decide to expand (say add more agents or turn on an add-on like Sidekick AI), those costs are clearly documented (per agent cost or per conversation cost, respectively). Clients and reviewers have noted that Gladly's pricing and terms are straightforward and that support is very upfront about capabilities and costs. In summary, Gladly's proposals delineate exactly what you get and what any extra components will cost, helping avoid any hidden or unexpected charges in the total cost of ownership.	help.gladly.com capterra.com

Vendor Deep Dive

→ OneReach.ai

VOX Score	100 / 100
Coverage	20 / 20 questions "Yes"
HQ	Denver, CO
Website	www.onereach.ai

📞 Talk to OneReach.ai: james.mitzel@onereach.com

👥 <u>Ask VOX for Introduction</u>

May 2025 CX-Leader Preference Map for OneReach.ai

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	OneReach's platform allows you to configure the AI agent to identify itself to users. Organizations can easily include an automated greeting or disclaimer in the conversation flow so customers know from the start that they are conversing with an AI assistant.	https://onereach.ai/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	OneReach.ai includes robust compliance and data governance features for conversational AI. It supports major regulations like GDPR and CCPA (ensuring data deletion/retention control), provides automated PII detection/redaction, and can be configured for consent and privacy standards as required.	https://onereach.ai/

2. Consumer Trust & Frustration	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	The OneReach platform can monitor user sentiment and other frustration signals in real time. It offers built-in sentiment analysis (with multiple engines, even a custom GPT-4 model) to detect negative tone, and it logs fallback responses or missed intents – indicators of user frustration – during conversations.	https://onereach.ai/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	OneReach enables dynamic, seamless escalation from the bot to a human agent. The platform supports fully customizable handoff logic (e.g. on user request or low NLU confidence), and it even passes the live agent a summary of the conversation for context, making the transition smooth.	https://onereach.ai/

3. Efficiency & ROI	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	OneReach provides comprehensive analytics to demonstrate ROI. For example, one deployment led to a 10% improvement in call deflection and a 37% reduction in chats transferred to agents after implementing OneReach's AI, indicating shorter handle times and higher first-contact resolution by the bot. Note from vendor: This information can be collected, but needs to be designed as part of the flow.	https://onereach.ai/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	OneReach.ai offers extensive agent-assist capabilities to help human agents in real time. The system can suggest recommended next actions or auto-generated replies to agents based on conversation context, provide sentiment/emotion insights, and even use a "whisper agent" that feeds the live agent helpful information (like relevant knowledge or form-filling widgets) during the interaction.	https://onereach.ai/

May 2025 CX-Leader Preference Map for OneReach.ai

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	OneReach was designed for complex enterprise integrations. It provides a library of 700+ pre-built integration "steps" and acts as an orchestration layer between systems. The platform supports deep integrations with legacy and modern systems (from telephony to CRM like Salesforce/Oracle), following best practices to unify data across multiple back-ends.	https://onereach.ai/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	OneReach supports real-time integrations with major platforms to unify data. It offers prebuilt connectors for 60+ enterprise systems (e.g. Salesforce, Workday, etc.) and can listen for events/updates via APIs or webhooks. This means the AI agent can pull in current CRM/eCommerce/CDP data (purchase history, profile info) on the fly to personalize interactions.	https://onereach.ai/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	OneReach logs and stores rich conversation data (transcripts, user info, etc.), and it provides granular role-based access control over that data. All data is encrypted at rest and in transit, and only authorized roles can access sensitive conversation records – privileges are restricted based on identity/role to ensure privacy.	https://onereach.ai/
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	OneReach.ai includes built-in tools to support auditing and compliance of AI interactions. For example, the platform can automatically identify and redact PII from chat transcripts and supports compliance standards (GDPR, SOC 2, etc.), preserving audit trails of conversations for review. Note from vendor: This would be another thing that would be supported if considered in the design of the flow/solution.	https://onereach.ai/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	OneReach's Intelligent Digital Workers can be configured to handle routine customer inquiries end-to-end. The platform's integration capabilities allow the AI to retrieve order status, process return requests, or provide product info/recommendations by pulling data from eCommerce or CRM systems – all without requiring a human agent, thereby offloading these common tasks.	https://onereach.ai/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	OneReach supports dynamic personalization in conversations. It can leverage customer data like purchase history and stated preferences to tailor product recommendations. The platform's use of conversational memory and graph databases means an AI agent can remember user attributes and context, then offer personalized suggestions (for instance, recommending products that align with a customer's past purchases).	https://onereach.ai/

May 2025 CX-Leader Preference Map for OneReach.ai

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	OneReach provides real-time dashboards and reporting for its conversational AI. Users get both standard and customizable reports to monitor metrics such as user satisfaction (e.g. CSAT/NPS if integrated), fallback/unsuccessful rate, and even business outcomes like conversion or drop-off rates. The platform's analytics can visualize trends (missed intents, completion rates, etc.) live and allow drilling down for insights.	https://onereach.ai/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	OneReach emphasizes tracking business KPIs impacted by its AI. In retail use cases, the platform has driven significant revenue lifts (one summary highlights $150 million in annual net new revenue for clients), and it includes solutions to reduce customer churn by identifying at-risk customers and engaging them with personalized support via AI agents.	https://onereach.ai/ https://onereach.ai/

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Absolutely. OneReach is actively advancing "next-gen" conversational AI. Their platform (Generative Studio X) integrates generative AI capabilities – allowing custom GPT-powered agents and multi-agent orchestration – and supports multimodal interactions including voice. For example, OneReach highlights that you can securely connect GPT agents to systems to facilitate eCommerce orders via voice or chat, reflecting its focus on agentic AI innovations.	https://onereach.ai/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	The OneReach platform supports continuous AI model training and optimization. It can automatically collect new user utterances and feedback to improve the models over time. Features like unsupervised learning suggestions, reinforcement learning (e.g. thumbs-up/down feedback), and human-in-the-loop review allow the AI to be regularly updated and fine-tuned as your business data or rules change. Note from vendor: Yes, if included as a requirement and designed in the solution.	https://onereach.ai/

May 2025 CX-Leader Preference Map for OneReach.ai

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	OneReach.ai offers ongoing professional services and support. They have a team of experts that provides consulting, custom development, and training continuously – not just during initial implementation. This means as your business grows or changes (new use cases, peak seasonal needs, etc.), OneReach's team can help adapt and extend your AI solution accordingly.	https://businessabc.net/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	OneReach provides enterprise-grade SLAs and performance guarantees. For example, the platform operates with a 99.9% uptime SLA for its services. They also pair customers with a dedicated support team (with decades of AI experience) to ensure prompt support responsiveness and performance tuning for mission-critical AI customer interactions.	https://onereach.ai/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	No	OneReach uses a flexible pricing model tailored to each enterprise, and it is designed to scale with usage. While specific pricing is custom, analysts note that OneReach emphasizes scalability and likely offers cost-effective options for varying volumes. In practice, this means pricing can accommodate seasonal spikes or fluctuation in interaction volume without surprise charges or hidden fees.	https://aiagentstore.ai/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	No	OneReach is transparent about additional costs in its proposals. Any setup fees, optional add-on costs, or professional service charges are documented upfront (the company indicates such fees are published or provided upon request), so you have clarity on implementation and expansion expenses with no hidden surprises.	https://onereach.ai/

Vendor Deep Dive

→ Aisera

VOX Score	100 / 100
Coverage	20 / 20 questions "Yes"
HQ	Palo Alto, CA
Website	www.aisera.com

📞 Talk to Aisera: gary.pelczar@aisera.com

👥 Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Aisera

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Aisera supports transparent bot identity. Its best practices (via the TRAPS framework for Trusted AI) emphasize transparency in AI interactions, meaning virtual agents can be configured to introduce themselves as AI assistants. This ensures users know they're chatting with an automated assistant rather than a live agent.	https://aisera.com/
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Enterprise-grade compliance is built in. Aisera is GDPR-compliant and provides all necessary controls to support data deletion requests under the Right to be Forgotten. It also aligns with CCPA for consumer data rights and will sign HIPAA BAA agreements for sensitive data. These measures, along with AI governance policies, ensure data handling and consent practices meet regulatory standards.	aisera.com aisera.com

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Aisera's platform includes sentiment & emotion detection. It analyzes user messages for negative sentiment and emotions like frustration or disappointment. If the AI detects sustained negativity, it flags user frustration. This real-time sentiment analysis even allows the system to adjust its tone or take corrective action (like escalation) when a customer appears unhappy.	aisera.com
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Seamless escalation is supported. When needed (e.g. user asks for an agent or sentiment is very negative), Aisera's virtual assistant will escalate to a live agent with context. The handoff is smooth and context-aware – the agent receives the conversation history so the customer doesn't repeat themselves. Aisera explicitly touts "seamlessly escalates requests to the correct agent when necessary" in its customer service solution.	aisera.com aisera.com

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Aisera provides robust analytics on support outcomes. Customers can track call/chat deflection rates, resolution times, and FCR through its dashboards. For example, McAfee's deployment saw deflection climb from ~45% to over 70% as the AI learned. Metrics like auto-resolution rate (e.g. 74%) and CSAT improvements are recorded. Similarly, Snowflake's case notes a 63% reduction in MTTR and thousands of agent hours saved – indicating these KPIs are measured and attributable to the AI.	aisera.com aisera.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	AI Agent-Assist capabilities are a core feature. Aisera's Agent Assist module uses domain-specific LLMs to recommend relevant knowledge articles, next-best actions, and even draft responses for agents. It can generate real-time case summaries and pull answers so that live agents can resolve issues faster. These assist features are embedded directly into agent tools (e.g. Salesforce, Zendesk) to boost productivity without switching screens.	aisera.com aisera.com

May 2025 CX-Leader Preference Map for Aisera

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Aisera is built to integrate across a complex enterprise stack. It offers 400+ connectors and open API support, allowing it to tie into legacy applications, multiple CRM systems, commerce platforms, etc. The platform's "Universal Bot" approach lets one AI interface span disparate systems. Aisera documentation highlights easy connections to any app with open APIs. In practice, it layers automation atop ITSM tools, CRMs, and customer data sources for a unified experience, showing a documented ability to handle multi-system integration.	aisera.com aisera.com
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Real-time integration with customer data is supported. Aisera connects with leading CRMs (Salesforce, HubSpot, Zendesk, etc.) and eCommerce platforms via its integration hub. It continuously ingests data from these systems to keep user profiles and order info up-to-date. The platform can fuse data from various sources into a unified context, enabling personalized, up-to-the-moment interactions. Aisera specifically notes it can leverage "customer data sources to provide a unified experience" without forcing agents to "jump through hoops", indicating near-real-time sync for personalized AI responses.	aisera.com aisera.com

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Conversation data is stored securely, with enterprise-grade access controls. Aisera's system logs every request and interaction in its admin console for auditing – meaning transcripts are retained for training and analysis. These logs reside in a SOC 2 Type II compliant environment. Role-based access can be applied so that only authorized admins or roles can view sensitive conversation records. (The platform's security model, aligned with SOC2 and similar standards, ensures data access is restricted by role to protect personal info.)	aisera.com aisera.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Aisera provides built-in auditing and oversight for AI interactions. The admin console offers comprehensive logging of every conversation, so companies can review chatbot exchanges for compliance and quality. Moreover, Aisera follows a "TRAPS" framework – Trusted, Responsible, Auditable, Private, Secure – to enforce ethical AI practices. This means the platform undergoes regular AI audits (bias/fairness checks) and supports features like conversation transcripts export and review. These tools help clients conduct AI audits and meet compliance requirements on an ongoing basis.	https://aisera.com/ https://aisera.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Common retail inquiries are handled end-to-end by Aisera's AI. For instance, customers can track orders, change shipping addresses, initiate returns, or place new orders just by chatting with the bot. The virtual assistant integrates with order management systems to retrieve order status or process a return without human help. It can also answer product questions or store-locator queries. By automating these frequent tasks, Aisera significantly reduces live agent workload on routine inquiries.	aisera.com aisera.com
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Aisera's platform enables dynamic personalization in conversations. In eCommerce use-cases, the AI can leverage customer history and profile data to suggest tailored products or offers. Aisera highlights "highly personalized offers and product recommendations within the bot" to engage customers and boost conversions. This means the virtual agent isn't one-size-fits-all – it can, for example, recommend accessories related to a user's recent purchase or promotions aligned with their preferences, encouraging self-service with a personal touch.	https://aisera.com/

May 2025 CX-Leader Preference Map for Aisera

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Real-time analytics dashboards are included. Aisera provides 100+ pre-built visualizations and live metrics for conversation AI performance. In the admin UI, teams can monitor KPIs like auto-resolution rate, escalation/fallback rate, and user satisfaction scores. The platform also offers sentiment analysis insights – e.g. dashboards to see what customers love or hate – which correlate with CSAT. Users report that Aisera's analytics helped track improvements like higher CSAT and lower abandonment as self-service was adopted. These dashboards update continuously, enabling data-driven optimization of the AI.	aisera.com aisera.com
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Aisera's conversational AI is geared toward improving business KPIs, and those impacts can be measured. For example, by delivering personalized product suggestions and offers, companies see increased conversion rates and larger deal sizes (indicative of cross-sell/upsell success). The platform also provides customer insights like churn prediction – allowing businesses to track reductions in churn as the AI improves service. While Aisera's tooling focuses on support metrics, its case studies and dashboards link AI interactions to outcomes such as higher sales conversions and improved retention (e.g. higher loyalty scores when AI quickly resolves issues). These eCommerce KPIs can be monitored by integrating Aisera's analytics with sales data.	aisera.com aisera.com

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Aisera is at the forefront of next-gen AI for enterprise CX. It offers generative AI capabilities – for instance, AiseraGPT and domain-specific LLMs power the virtual agent to generate fluent, context-aware answers and summaries. Its Agentic AI approach enables the bot not just to answer questions but to autonomously execute tasks (via RPA and workflow automation). Aisera also has an AI Voice Bot for phone interactions, providing human-like conversational voice support. The voice bot can handle complex dialogs and even transfer the call to a human agent with context when needed. These developments (GenAI, agentic automation, and omnichannel voice/chat) show Aisera's commitment to cutting-edge conversational AI features.	aisera.com aisera.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Continuous learning is built-in. Aisera's platform uses automated ML and reinforcement learning on new data (tickets, chats) to constantly improve its models. It self-learns from every interaction – updating intent models and responses as new issues or product lines emerge. For major changes (new product launches, new FAQs), Aisera can ingest updated knowledge bases or be quickly tuned, either by the client or with Aisera's help. This ongoing training means the AI's accuracy and relevance stay up-to-date with the business (unlike a one-off static model).	aisera.com

May 2025 CX-Leader Preference Map for Aisera

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Aisera provides customer success and partner services to ensure the AI solution evolves with your business. Enterprise clients are typically paired with Aisera's experts (or certified partners) for onboarding, training, and continuous optimization. In fact, Aisera has partnerships with Managed Service Providers and Global System Integrators who handle day-to-day AI management and can rapidly implement new use-cases or channels as the business grows. This means as you add new lines of business or face seasonal peaks, Aisera's team (or partners) will help adapt the virtual assistant – fine-tuning intents, adding integrations, and ensuring performance keeps up with change.	https://aisera.com/
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Aisera offers enterprise-grade SLAs. The platform is cloud-based with a proven 99.99% uptime record, ensuring the virtual agent is almost always available to customers. This high availability is critical for 24/7 customer service. Aisera also commits to responsive support for its clients (typically with 24/7 support options for enterprise contracts), so any system issues are addressed promptly. In terms of performance, Aisera's contracts can include response time and resolution rate benchmarks. Overall, the company's focus on Fortune 1000 clients means strong reliability guarantees are in place (as evidenced by the 99.99% uptime achieved).	https://aisera.com/

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Flexible, usage-based pricing is available. Aisera's pricing is typically tailored to the customer's size and usage – "the cost of using an AI chatbot depends on the solution, organization size, processes, and use case". This implies transparency in how pricing is determined and an ability to scale up or down. Clients can work with Aisera on pricing that accounts for seasonal spikes (for example, higher chat volume during holidays) via volume-based subscription plans that avoid surprise overage fees. Aisera even provides an ROI calculator to help forecast costs vs. benefits. Customers have reported that pricing is straightforward, with no hidden fees beyond the agreed subscription and any additional services explicitly outlined.	https://aisera.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Cost proposals from Aisera are transparent about what's included. During the sales process, Aisera typically provides a detailed SOW (Statement of Work) covering implementation fees, any one-time setup costs, ongoing subscription fees, and optional add-ons (like additional channels or integrations). They emphasize ROI, so all costs are tied to expected value. As noted, pricing is use-case dependent – meaning if you plan to add a new channel or expand scope, those factors are discussed up front. Users have found that professional services and expansion options are clearly enumerated in Aisera's proposals, so you understand the fees for things like deploying to a new customer channel or ongoing tuning. This clarity helps avoid any hidden costs when scaling the solution.	https://aisera.com/

Vendor Deep Dive

→ Interactions

VOX Score	100 / 100
Coverage	20 / 20 questions "Yes"
HQ	Franklin, MA
Website	www.interactions.com

📞 Talk to Interactions: jrisgin@interactions.com

👥 <u>Ask VOX for Introduction</u>

May 2025 CX-Leader Preference Map for Interactions

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Interactions' IVA can be configured to play required notices and disclaimers at the start of an interaction. The platform supports pre-recorded messages (e.g. terms, notifications) to ensure customers are informed when interacting with an automated system. This allows compliance with transparency laws by clearly indicating the assistant is an AI.	interactions.com
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Interactions is built with rigorous compliance flexibility. Clients control data handling policies – for example, Interactions will retain or purge call recordings based on the business' requirements (e.g. delete after 24 hours if needed). The IVA complies with major privacy regulations (GDPR, CCPA, PCI-DSS, etc.) and can meet "right to be forgotten" by erasing data per policy. Any required customer consents (for data use or bot interaction) can be accommodated via scripted dialogues and prompts as part of the IVA flow.	interactions.com interactions.com

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	The Interactions IVA actively monitors for signs of frustration or misunderstanding and adjusts in real time. If the AI's confidence in understanding drops (e.g. due to repeated failures or unclear input), a Human Assisted Understanding agent is engaged immediately to interpret the customer's request, preventing the user from having to repeat themselves. The platform also captures customer sentiment in conversation transcripts – every interaction is transcribed and even analyzed for sentiment, providing insight into frustration levels. These mechanisms allow the system to detect frustration (low AI confidence, negative language tone) and address it promptly (by human assistance or escalation).	interactions.com interactions.com https://www.interactions.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Interactions supports smooth escalation to live agents whenever needed – whether due to customer request or frustration. If a caller insists on a human or the issue is too complex, the IVA will warm-transfer the call to a live agent with context. Before handoff, the IVA can authenticate the customer and gather details, then share that information with the agent so the customer isn't asked to repeat information. This ensures a seamless transition from bot to human, preserving conversation context and reducing customer effort.	interactions.com interactions.com https://www.interactions.com/

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	The Interactions platform includes robust analytics and reporting on key contact center metrics influenced by the IVA. Out-of-the-box dashboards track self-service containment (deflection) rates, resolution rates, and handle time impacts. Users can drill down into any data point – for example, to see how many inquiries were fully contained by the IVA vs. transferred. The system ties conversation data to KPIs like First Contact Resolution, Average Handle Time (AHT), and even customer satisfaction, making it clear how the AI is reducing handle times and improving resolution rates.	interactions.com https://www.interactions.com/
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Interactions offers an AI-powered Agent Assist module (recently launched as "Task Orchestration") that helps live agents in real time. For instance, the platform can suggest auto-generated reply drafts and step-by-step guidance to agents during a chat or call. Agents can simply use or tweak these recommended responses, which speeds up handling and ensures consistent answers. The Agent Assist can also retrieve knowledge base info on the fly – agents can query documentation via the IVA to get quick answers to uncommon questions. These features offload cognitive effort and make agents more efficient.	interactions.com interactions.com

May 2025 CX-Leader Preference Map for Interactions

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Integration flexibility is a core capability of Interactions. The company emphasizes a consultative, "white-glove" approach to integrations, working closely with clients to connect the IVA to various back-end systems (even home-grown or less common ones). Interactions' professional services team helps design and maintain complex integrations with CRMs, eCommerce databases, legacy telephony and more. With 20+ years of experience, they have established best practices to integrate with all major technology vendors and custom legacy systems, ensuring the IVA works seamlessly in a complex enterprise environment.	interactions.com interactions.com https://www.interactions.com/
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Interactions' IVA can connect to CRM, eCommerce, and customer data platforms in real time to leverage customer information during conversations. It supports unified omnichannel context, meaning the assistant can pull in past order history, loyalty status, or profile data on the fly to personalize service. For example, the IVA can retrieve a customer's recent purchases or cart contents from an eCommerce system during the dialog. The platform's context persistence across channels ensures that data from any channel or prior interaction is available to personalize the next interaction. These integrations happen securely and near real-time, so the AI always references up-to-date customer info.	interactions.com interactions.com

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Interactions does store conversation records (call transcripts, chat logs, etc.) for analytics and quality improvement, but personally identifiable information (PII) is automatically redacted before it is saved. The platform adheres to strict security controls: all data is protected via role-based access control, so only authorized personnel can view conversation records. In practice, this means transcripts and analytics are available to clients, but sensitive details (like credit card numbers or personal data) are masked, and access to these records can be limited by user role.	interactions.com interactions.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Interactions has multiple safeguards and tools to ensure AI-driven interactions remain compliant. All IVA dialogue flows are fully scripted and approved by the client – in fact, customers sign off on every prompt the IVA will use to ensure it aligns with policy. For generative AI features, Interactions uses human review as a guardrail: any AI-generated content (e.g. summaries or suggested replies) is vetted by employees before reaching customers. Additionally, the IVA platform complies with standard audit requirements: all conversations are logged and can be reviewed, and the system meets regulations like GDPR and PCI with measures such as encryption and role-based data controls. Together these serve as an audit trail and compliance toolkit for AI interactions.	interactions.com interactions.com https://www.interactions.com/

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Interactions IVAs are designed to handle the vast majority of routine customer inquiries end-to-end. In a retail context, for example, the IVA can look up order status, track shipments, initiate returns or exchanges, and even process payments without needing a human agent. In fact, Interactions reports that over 90% of customer inquiries can be resolved via self-service with their IVA, significantly offloading work from live agents. Even product recommendations or FAQs can be managed by the AI, with agents only handling exceptions or complex cases.	interactions.com interactions.com https://www.interactions.com/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	The Interactions platform supports dynamic personalization and upselling in conversations. Using integrations with CRM and eCommerce systems, the IVA can make context-aware product recommendations. For instance, the virtual agent can suggest items left in the customer's online cart, remind them of products they frequently repurchase, or recommend accessories related to their recent buys – all within the dialogue. These personalized suggestions leverage the customer's history and current context to drive engagement and self-service conversions (the IVA can even securely take payment for the recommended item during the chat).	interactions.com https://www.interactions.com/

May 2025 CX-Leader Preference Map for Interactions

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Interactions provides a comprehensive analytics dashboard for its IVA. Clients get real-time visibility into metrics like customer satisfaction (e.g., CSAT or sentiment scores), containment/fallback rates (how often the IVA handled inquiries vs. transferred), and even business-specific metrics like cart recovery or sales through the IVA. The reporting interface allows drilling down to individual conversations and creating custom dashboards. It also uses AI to surface trends and suggests actions. For example, the system can tie conversation outcomes to KPIs such as resolution rates, Average Handle Time, Customer Effort, and revenue generated, so business impact (like reduced abandonment or higher order values) can be tracked directly.	interactions.com https://www.interactions.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	The IVA's analytics toolkit enables businesses to correlate AI interactions with eCommerce outcomes. Interactions' platform can track how the IVA influences conversion metrics – for example, close ratios on sales offers, upsell/cross-sell acceptance rates, and resulting revenue from the virtual assistant. Average Order Value (AOV) lift from AI-driven recommendations can be measured by tying purchase data to whether the IVA was involved in the sale. Likewise, churn or retention can be inferred by tracking repeat self-service usage and customer satisfaction over time. The solution provides a "record of truth" for each customer interaction, allowing companies to analyze these records for KPIs like churn or lifetime value impacts. (Interactions specifically notes the ability to link interaction data to metrics like revenue generation and close rates to quantify success.)	interactions.com https://www.interactions.com/

8. Roadmap & Future Innovations

Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Interactions is at the forefront of next-gen conversational AI. The platform blends Large Language Models and Generative AI with its traditional conversational engine. For example, it can generate dynamic, contextually appropriate responses for unstructured tasks and automatically summarize interactions. Interactions has also long supported voice channels – its IVA handles natural speech on phone calls and even allows seamless switching between voice and text channels in one conversation. Recent enhancements include AI-generated agent responses, automated conversation summaries, and knowledge retrieval using GenAI, as well as the new Task Orchestration agentic capability that lets the AI agent autonomously complete complex tasks by invoking humans behind the scenes. All these demonstrate Interactions' commitment to advancing the state of conversational and "agentic" AI.	interactions.com interactions.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Interactions engages in continuous improvement for its AI. They do not "set and forget" the model – instead, a dedicated Lifecycle Services (customer success) team works with the client after go-live to monitor performance and refine the IVA. This includes retraining or tuning the AI when new product lines are introduced or when customer phrasing changes, and updating dialog flows to reflect policy or compliance updates. In practice, Interactions reviews analytics regularly (often weekly with the client) to identify any new intents or failure points and then updates the IVA accordingly. This ongoing training and optimization ensures the AI stays aligned with the brand's latest offerings and requirements.	interactions.com interactions.com https://www.interactions.com/solutions

May 2025 CX-Leader Preference Map for Interactions

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Yes – Interactions' engagement model includes continuous consulting and support. They pride themselves on a "white-glove" service approach, meaning their experts remain involved to adjust the solution over time. As the business changes or seasonal spikes occur, Interactions helps reconfigure and scale the IVA accordingly (for example, adding new intents for a new product line, or adjusting capacity for holiday season volumes). The partnership is ongoing: Interactions explicitly states that after initial launch ("Day One"), they show up on "Day Two and every day after" to ensure the platform keeps delivering value. Clients also receive training and documentation so their teams can collaborate in evolving the AI.	interactions.com interactions.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Interactions supports mission-critical customer service for Fortune 500 brands, and accordingly offers enterprise-grade SLAs. The IVA is delivered from highly available U.S. data centers with redundancies to ensure uptime. While specific SLA figures are provided in contracts, Interactions' track record (over 1 billion transactions annually handled) and compliance with strict standards (e.g. PCI-DSS for reliability in payments) demonstrate its reliability. Additionally, Interactions uses a "shared-success" pricing model which in effect guarantees performance – they only get paid when the IVA successfully handles interactions, aligning the company to meet performance targets. Support teams are available and responsive; as a partner, Interactions commits to prompt issue resolution to maintain agreed-upon uptime and service quality.	interactions.com interactions.com

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Interactions' pricing is usage-based and designed to be flexible. Notably, they use a success-based pricing approach: rather than a flat license fee, clients pay per successful transaction or outcome, which naturally scales with volume. This model accommodates seasonal swings – if volume spikes during peak season, the IVA simply handles more transactions (at the per-interaction rate), without punitive overage fees. Conversely, during slower periods clients aren't stuck paying for unused capacity. This outcome-oriented pricing means there are no hidden fees; costs are clearly tied to the value delivered. (As Interactions notes, there are no arbitrary monthly fees that you pay regardless of utilization.)	interactions.com https://www.interactions.com/
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Interactions is transparent in its proposals about all associated costs. Because their model is centered on shared success, the upfront proposal will outline any implementation or professional service fees and then the transaction-based fees going forward. Additional channel support or expansion of scope is similarly scoped out in advance. The company emphasizes no surprises – for instance, they highlight that unlike some vendors, they don't charge a recurring fee regardless of value delivered. Any costs for new integrations or channels would be discussed during the engagement and clearly documented. Clients have reported that Interactions' pricing and value alignment make it clear what they are paying for, reducing the chance of unexpected charges.	interactions.com interactions.com

Vendor Deep Dive

Ada

VOX Score	100 / 100
Coverage	20 / 20 questions "Yes"
HQ	Toronto, Ontario
Website	www.ada.cx

Talk to Ada: tatiana.deabreu@ada.support

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Ada

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Ada allows you to configure a custom greeting at chat start, so you can clearly introduce the AI agent as a virtual assistant. This ensures customers are notified they're chatting with an AI from the first interaction.	docs.ada.cx
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Ada is built with compliance in mind – it adheres to GDPR "right to be forgotten" via a Data Compliance API for deleting personal data, and is certified for standards like SOC 2 and HIPAA. In short, Ada's platform meets data privacy requirements (e.g. GDPR) for AI interactions.	developers.ada.cx

2. Consumer Trust & Frustration	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Ada's platform tracks when conversations aren't going well – for example, it captures unhelpful loops or failed interactions. This provides visibility into customer frustration (e.g. repeated unanswered questions), enabling real-time detection of issues.	ada.cx
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Ada supports smooth transfers to human agents whenever needed. You can configure triggers for frustration or user preference, and Ada will route the chat to a live agent on any channel. It even lets customers schedule human callbacks, ensuring an effortless handoff experience.	ada.cx

3. Efficiency & ROI	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Ada provides an analytics dashboard tracking key support metrics attributable to the AI. For example, clients can see deflection/"Automated Resolution" rates, CSAT, and handle-time improvements due to the bot. (Case in point: Ada's platform has driven ~42% reductions in handle time in deployments.) Note from vendor: Additionally, Ada customers see an 83% resolution of their customer service inquiries.	ada.cx
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Ada improves live agent productivity by passing rich context and suggested info to agents during handoff. For instance, Ada can integrate with systems like Zendesk or Salesforce to create tickets with conversation history and customer data, so agents get recommended context and knowledge immediately.	ada.cx

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May 2025 CX-Leader Preference Map for Ada

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Ada offers documented guidance and an ACX (Ada Customer Experience) framework to tackle complex integrations. In practice, Ada customers like AllTrails and NinjaTrader successfully connected multiple systems (Zendesk, subscription platforms, CRMs, etc.), and Ada shares these learnings to help enterprises integrate legacy tech and multiple data sources.	ada.cx
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Ada's platform natively syncs with major ecommerce and CRM tools in real time. It has plug-and-play integrations (e.g. Salesforce, Shopify, Contentful, Twilio) that share customer data across systems instantly, enabling the AI to deliver personalized interactions with up-to-date info.	ada.cx

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Ada does store chat transcripts and customer info, and it provides role-based access controls in its dashboard. Team members are assigned roles (Owner, Admin, Agent, Read-Only) with defined permissions – so only authorized users can view or export sensitive conversation records. Ada even lets end-customers download their own chat transcript if permitted .	docs.ada.cx
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Ada includes built-in safety and compliance controls. For example, you can define automatic redaction rules for sensitive data – the AI will then hide that information from its responses and transcripts (even agents won't see it). These safety measures ensure every AI interaction aligns with your company's policies and compliance needs.	docs.ada.cx

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Ada is designed to fully handle routine retail inquiries end-to-end. With the right integrations, Ada's AI agent can autonomously provide order status, process returns/exchanges, manage subscriptions, recommend products, and more – offloading those tasks from live agents.	ada.cx
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Ada can deliver dynamic, personalized recommendations by leveraging customer data through integrations. Because the AI agent "understands who a customer is" when hooked into your CRM/eCommerce systems, it can use past purchases or preferences to tailor suggestions and encourage self-service buying.	ada.cx

May 2025 CX-Leader Preference Map for Ada

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Ada provides real-time dashboards to monitor your AI agent's performance. The platform lets you track metrics like customer satisfaction (CSAT scores), fallback/containment rate, automated vs. assisted resolution, and even conversion outcomes across all channels in one place.	ada.cx
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Ada helps companies tie AI interactions to business outcomes. Many Ada clients report that the AI agent drives higher upsell and retention – Ada pitches its solution as turning support from a cost center into a "growth engine," boosting customer lifetime value and reducing churn through better service. (Clients can analyze KPIs like AOV or churn by integrating Ada's data with their ecommerce analytics.)	ada.cx

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Ada is actively at the forefront of next-gen AI. Its "AI agent" goes beyond scripted bots by using generative models and an advanced reasoning engine. Ada's agent can autonomously retrieve knowledge, execute backend actions, and even operate over chat, email, and voice channels – all powered by modern generative AI capabilities .	ada.cx
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Ada provides tools and services to keep the AI up-to-date. For instance, the platform has an AI Coaching feature that lets your team give feedback on the AI's responses and decisions, so the system continuously learns and adapts to new products, policies, and preferences over time. Ada's team also offers guidance to optimize the bot as your business evolves.	docs.ada.cx

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May 2025 CX-Leader Preference Map for Ada

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Ada supports its clients with ongoing expertise to adapt the AI as needs change. They provide resources like Ada Academy (for training) and an ACX consulting team. In fact, Ada has a proven framework and "best practices" webinars for scaling AI – helping customers like AllTrails and NinjaTrader continuously improve and expand their AI use cases over time.	ada.cx
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Ada delivers enterprise-grade reliability and backs it with strong performance. Its status page shows ~99.99% uptime over the past 90 days, and Ada's support team is available (e.g. via help@ada.support) to promptly assist with any issues. High availability and scalability are core to Ada's platform design.	status.ada.support

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Ada uses a simple usage-based pricing model that scales with your volume. The pricing is designed to flex for seasonal spikes – you pay based on usage, with no surprise charges. In fact, every key capability is included in the package, so you won't run into hidden fees as you grow.	ada.cx
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Ada's pricing and proposals are straightforward about all costs. All core features (adding new channels like voice, integrations, etc.) are bundled into the standard package, so any implementation or expansion expenses are clearly outlined up front. Ada avoids nickel-and-diming – the cost structure is transparent when you evaluate the solution.	ada.cx

Vendor Deep Dive

→ [24]7.ai

VOX Score	100 / 100
Coverage	20 / 20 questions "Yes"
HQ	San Jose, CA
Website	www.247.ai

Talk to [24]7.ai: www.247.ai

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for [24]7.ai

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	[24]7.ai's virtual agents can be configured to introduce themselves as AI assistants. In fact, [24]7.ai requires its clients to obtain end-user consent for AI interactions, ensuring transparency that the customer is engaging with an automated agent.	247.ai
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	The [24]7 Engagement Cloud includes robust compliance features. It supports GDPR-aligned data handling (e.g. configurable data retention for chat/voice transcripts) and requires end-user consent for AI interactions. [24]7.ai also emphasizes that customers "own and control your data," empowering deletion or privacy requests in line with regulations.	developers.ada.cx

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	[24]7.ai's platform actively detects customer sentiment in real time. For example, the system can recognize when a customer is becoming uncomfortable or frustrated and flag this immediately. Such sentiment detection allows the AI to take appropriate action (like adjusting responses or escalating the conversation).	247.ai
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	The platform supports seamless bot-to-human handoffs. If the AI senses negative sentiment or the user requests a human, it can automatically escalate the session to a live agent. [24]7 Conversations allows configured transfers/escapes to agents during any customer journey, ensuring a smooth transition when needed.	247.ai 247.ai

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	[24]7.ai provides comprehensive dashboards and reporting to quantify AI outcomes. The Engagement Cloud's built-in analytics can track self-service containment (deflection rates), handle times, resolution rates, etc., across channels in real time. Users can create custom performance dashboards to monitor key KPIs (like deflection or FCR) and attribute improvements to the AI interactions.	247.ai
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	[24]7 Assist™ includes an Agent Assist capability (part of the [24]7 Copilot suite) that provides real-time AI suggestions to agents. It delivers next-best response recommendations and surfaces relevant knowledge base articles based on the live conversation context, customer data, and history. These features help agents respond faster and more accurately, boosting productivity.	247.ai

May 2025 CX-Leader Preference Map for [24]7.ai

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	[24]7.ai's platform was built with enterprise integration in mind. The Conversation Builder supports "CRM dips" and API hooks to pull/push data from legacy systems in real time. Additionally, [24]7 Assist allows embedding widgets in CRMs for deep integration (customer profile lookup, case creation, etc.), demonstrating a documented approach to integrating with CRM and backend systems.	247.ai 247.ai
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	The [24]7 Engagement Cloud provides connectors and APIs for real-time data access. AI journeys can call external systems on the fly – for example, fetching CRM or eCommerce data during a chat/IVR session (via API calls or "CRM dips"). [24]7 Assist also embeds into CRM environments, meaning the bot and agent share unified, up-to-date customer context across systems.	247.ai 247.ai

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	The platform can retain interaction transcripts securely, with customizable retention periods. Robust access controls are in place – [24]7.ai implements strict role-based access control (RBAC) so that only authorized roles/personnel can view sensitive conversation records. This ensures conversation data is stored securely and only accessible on a need-to-know basis.	247.ai 247.ai 247.ai
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	[24]7.ai offers an AI-driven Conversation Insights analytics module that enables quality and compliance monitoring across 100% of interactions. It can automatically record and analyze all chats/calls, flagging script adherence and compliance issues. Features like automated QA of conversations (with transcript search, sentiment over time, and even webcam workspace monitoring for agents) are available to ensure interactions meet legal and policy standards.	247.ai 247.ai

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	The platform enables end-to-end self-service for routine tasks. [24]7 Answers™ handles simple FAQ-type questions through an interactive knowledge base without agent involvement. For transactional inquiries like order status or returns, [24]7 Conversations™ lets companies build multi-turn automated flows that can execute transactions (via backend API calls) as self-service interactions. These capabilities offload a significant volume of common queries from live agents.	247.ai 247.ai
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	[24]7.ai supports personalized AI interactions by leveraging customer data. The platform's targeting engine can use a customer's purchase history, browsing behavior, and profile to deliver contextual, personalized content or suggestions. For instance, [24]7 Target™ draws on past customer data (web journey, demographics, etc.) to present tailored offers in real time. In practice, a [24]7 virtual agent can be integrated with recommendation engines or CRM data to suggest relevant products during the conversation.	247.ai

May 2025 CX-Leader Preference Map for [24]7.ai

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	The Engagement Cloud includes real-time performance dashboards for conversational AI. Users can monitor metrics like customer satisfaction (e.g. CSAT or sentiment), bot fallback/containment rates, conversion outcomes, etc., via configurable charts and live reports. The platform allows drilling down into conversations and creating custom dashboards, giving up-to-the-minute insight into AI KPIs and trends.	247.ai
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	[24]7.ai's analytics can correlate conversational AI with business outcomes. The system aggregates data across channels to provide cross-channel visibility into customer interactions and their results. This allows companies to tie AI engagements to revenue metrics – for example, tracking if the AI upsell offers increased conversion or if self-service improved retention. In fact, [24]7.ai often sets incremental revenue goals and cost reduction targets for its AI solutions, indicating a focus on measuring and achieving eCommerce KPI improvements.	247.ai info.247.ai

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	[24]7.ai has embraced generative AI and advanced capabilities in its roadmap. The platform uses large language models (LLMs) to handle open-ended intents and even provides Generative AI Bots for self-service that deliver more natural, "uncommon" intent responses. On the agent side, the [24]7 Copilot suite offers features like AI-driven conversation simulation and automatic summaries (agentic AI to assist agents). Additionally, [24]7 Voices™ (the voice IVR module) supports voice-based self-service and secure transactions (including fraud detection and voice authentication for commerce use-cases).	247.ai 247.ai
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	[24]7.ai enables continuous AI optimization through tools and services. The platform includes a Model Workbench that allows administrators (or [24]7.ai's data scientists) to regularly tune and retrain the natural language models as intents or business data evolve. [24]7.ai also offers professional services and an outcome-based approach where the vendor is "committed to continued success…continually improving the results", indicating they partner with clients to update and refine AI models for new products or policy changes over time.	247.ai info.247.ai

May 2025 CX-Leader Preference Map for [24]7.ai

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	[24]7.ai provides ongoing support to adapt the solution over its lifecycle. They have Managed Customer Engagement services and [24]7 Professional Services teams that work with clients on implementation and continuous optimization. Under outcome-based engagements, [24]7.ai is motivated to proactively adjust and improve the AI as business needs change (the vendor "assumes the risk" and is incented to drive ongoing success). Clients also have access to training resources (learning center, documentation) and can engage [24]7's experts to recalibrate bots for new use cases or seasonal spikes.	info.247.ai 247.ai
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	[24]7.ai offers enterprise-grade SLAs. The cloud platform is highly available (case studies cite ~99.99% uptime in production), and the support organization works 24/7 to maximize uptime and swiftly resolve any issues. Formal uptime guarantees and support response time SLAs are provided in contracts (typical for [24]7's cloud offerings), ensuring the AI services remain online and performant. [24]7.ai's willingness to use outcome-based contracts also serves as a performance guarantee, since payment can hinge on meeting agreed service levels.	247.ai info.247.ai

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	[24]7.ai's pricing models are designed to be flexible and outcomes-focused. They even offer Outcome-Based Pricing, a pay-for-performance model where fees correspond to results (e.g. successful resolutions) rather than just volume. This approach inherently scales with volume and means the vendor shares risk during peak or low seasons. Importantly, under outcome-based agreements "companies won't be hit with unplanned fees and expenses for professional services – it's all included" in the pricing. In standard arrangements as well, pricing is clearly scoped per channel/volume band, avoiding surprise overage charges.	info.247.ai info.247.ai
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	[24]7.ai provides upfront clarity on all cost components. Proposals and order forms delineate one-time implementation fees and any ongoing subscription or usage fees for each channel or feature. With outcome-based pricing, these costs are bundled such that professional services for setup and optimization are included (no hidden add-ons). Even outside of outcome-based deals, [24]7.ai's enterprise contracts explicitly list costs for additional channels or capacity, so customers have full visibility into how expansion or new features would impact the TCO.	info.247.ai outsourceaccelerator.com

Vendor Deep Dive

→ Netomi

VOX Score	79.73 / 100
Coverage	16 / 20 questions "Yes"
HQ	San Mateo, CA
Website	www.netomi.com

📞 Talk to Netomi: www.netomi.com

👥 Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Netomi

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	Netomi supports transparent bot identification. Netomi's best practices guide advises that a virtual agent should introduce itself clearly as a bot (e.g. "Hi, I'm your virtual assistant") so customers know they're chatting with AI. This indicates the platform is designed to let the bot automatically disclose its AI identity at the start of a conversation.	netomi.com
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Comprehensive data privacy compliance. Netomi is fully GDPR-compliant, and its platform minimizes data retention. According to Netomi's Privacy Policy, any personal info collected during a chatbot session is used only to serve that request and is deleted when the session ends. Netomi also requires explicit user consent for any use of personal data beyond fulfilling the customer's request. These measures support GDPR "right to be forgotten" and other AI data-handling regulations out of the box.	netomi.com netomi.com https://www.netomi.com/

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Built-in sentiment and frustration detection. Netomi's AI analyzes customer sentiment within seconds. The platform can pick up signals like all-caps or excessive punctuation and negative sentiment to infer frustration. Netomi's documentation notes that modern AI assistants use sentiment analysis to detect upset customers and can automatically adjust or escalate in real time.	https://www.netomi.com/#:~:text= https://www.netomi.com/
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Seamless live-agent escalation is supported. Netomi's virtual agent can be configured to hand off chats to a human agent whenever needed. In practice, if the AI detects it cannot help or the user is unhappy (or explicitly requests a human), Netomi will immediately transfer the conversation to a live agent, passing along the contex. This ensures frustrated users or those who prefer a human are smoothly transitioned without repeating information.	help.gladly.com

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Extensive AI performance analytics. Netomi includes real-time dashboards that track key support KPIs related to AI. For example, it reports the AI resolution rate (i.e. deflected cases) and other engagement metrics. Customers can see what percentage of contacts are handled autonomously (deflection) and how the AI is impacting resolution times. (Netomi's case studies often highlight >80% auto-resolution and faster response times, indicating improvements in FCR and handle time, though exact AHT reduction metrics can be derived from these reports.)	netomi.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	"Co-Pilot" mode for agents. In addition to full automation, Netomi offers an agent-assist mode. The AI can act as a sidekick to human agents, suggesting or drafting responses and pulling relevant knowledge in real time. Netomi explicitly highlights a Co-Pilot feature that assists agents with complex queries by drafting replies or offering next-best actions for the agent to review. This boosts agent productivity and consistency.	netomi.com

May 2025 CX-Leader Preference Map for Netomi

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Enterprise integration framework is provided. Netomi is built to integrate with existing systems without requiring a rip-and-replace. The platform offers a robust API and integration toolkit for connecting to CRMs, legacy databases, eCommerce platforms, etc. For example, Netomi's Conversational API allows plugging the AI into any third-party or bespoke system, enabling easy deployment within complex tech stacks. Netomi's documentation and integration guides (for platforms like Zendesk, Salesforce, Gladly, etc.) outline best practices (webhooks, data mapping, etc.) to ensure smooth integration even in complex enterprise environments.	netomi.com
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Yes, real-time integrations for personalized service. Netomi integrates with a wide range of CRM, eCommerce, and data platforms (Salesforce, Shopify, ServiceNow, etc.) and fetches customer data on the fly. Its context engine aggregates data from connected systems (loyalty info, order history, location, etc.) in real time to generate personalized responses. This means the AI can, for example, pull a user's latest order status or preferences from the CRM during the chat to tailor answers or recommendations instantly.	https://www.netomi.com/

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	No	Personal conversation data is not persistently stored by Netomi. By design, Netomi minimizes retention of chat transcripts containing personal data. Per its privacy policy, all personal info from a chatbot session is retained only for the duration of the session and deleted once the session ends. (Anonymized conversation data may be kept for training/analytics, but it contains no identifiable info.) Because identifiable conversation records are not stored in the platform after the fact, the question of in-platform role-based access is largely moot – there are no live PI-containing transcripts to restrict. (Any conversation logs needed can be passed into the client's systems where their own RBAC policies apply.)	netomi.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Yes, via embedded AI governance and response validation. Netomi's platform includes AI governance mechanisms to keep the AI's behavior compliant and on-brand. For example, Netomi has a Response Validation AI that checks the chatbot's replies against trusted knowledge sources and filters out any incorrect or unsanctioned content. This helps audit and prevent "rogue" AI behavior (e.g. hallucinations or policy violations) before the customer ever sees it. Additionally, Netomi's concept of "Sanctioned AI" means the AI operates within defined brand and regulatory guardrails, ensuring compliance with industry-specific requirements. Together, these tools let companies audit AI responses and be confident they meet compliance standards.	netomi.com https://www.netomi.com/#:~:text=Image e

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	High automation of routine tickets. Netomi's core capability is to deflect and auto-resolve the bulk of repetitive customer queries. It can handle FAQs and transactional requests end-to-end – for instance, checking order status, processing returns or refunds, providing product info or basic troubleshooting – without human intervention. Netomi reports that its AI can automatically resolve up to 90% of customer requests on channels like email and chat. Common eCommerce use cases (order tracking, cancellations, refunds, etc.) are well within its automation library, as evidenced by Netomi's industry pages and case studies.	https://help.gladly.com/
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Supports personalized recommendations. Netomi's AI can leverage customer data from connected systems (past purchases, browsing history, loyalty status, etc.) to offer tailored recommendations or upsells. The platform enables proactive, personalized engagements – e.g. suggesting complementary products or upgrades – by using each user's context and history. In practice, clients use Netomi to drive sales in support chats: the bot can act on cross-sell/up-sell opportunities by recommending relevant products during the conversation, creating a more personalized shopping/support experience.	https://www.netomi.com/

May 2025 CX-Leader Preference Map for Netomi

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Robust real-time analytics dashboards. Netomi provides an analytics suite with live dashboards to monitor conversational AI performance. Users can track metrics like AI resolution/fallback rates, customer engagement levels, and even sentiment trends in real time. For example, the dashboard shows how often the AI successfully handled inquiries versus handed off (which covers fallback/deflection), and can integrate customer feedback like CSAT for those interactions. (Metrics directly tied to cart abandonment would likely be monitored via the eCommerce platform, but Netomi's insights can show if the AI's engagement correlated with changes in such KPIs.)	https://www.netomi.com/
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	No	No explicit built-in tracking of those business metrics. Netomi's reporting focuses on customer service metrics (resolution rates, CSAT, etc.), and it does not publicly document native tracking of eCommerce KPIs like AOV or customer churn as part of its standard dashboard. While Netomi's AI can influence these outcomes (e.g. by enabling upsells or improving customer satisfaction), there is no evidence of a dedicated feature that attributes changes in AOV or churn directly to the AI. In other words, such business impact analysis would be done by the client's analytics, not via an out-of-the-box Netomi report. Netomi's own highlighted success metrics (e.g. "70%+ increase in CSAT" or cost reduction) do not mention AOV or retention rates.	netomi.com

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Netomi's platform is marketed as an "Agentic AI" OS, and it incorporates the latest AI advancements. For example, Netomi offers generative AI capabilities (they call it "Sanctioned Generative AI") that blend large language models with their proprietary tech for safe, on-brand responses. They also support voice-enabled AI agents – the solution can handle voice calls with features like speech recognition, barge-in, and intent narrowing for phone-based customer service. Netomi continuously innovates in this space (the company frequently mentions leveraging GPT-3.5/4, multi-modal AI, and voice assistants), so customers benefit from cutting-edge conversational and "agentic" AI features.	netomi.com https://www.netomi.com/
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Yes, through both tooling and support. Netomi's platform includes a built-in Optimize module that continually monitors performance and suggests improvements. It can identify new topics to automate and prompt for training data updates as your business evolves. In addition, Netomi's customer success team assists with ongoing tuning – ensuring the AI is re-trained on new product lines, updated policies, or vocabulary changes. This combination of automated optimization and human support keeps the AI's knowledge and behavior up-to-date with the latest brand and compliance requirements.	netomi.com

May 2025 CX-Leader Preference Map for Netomi

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Dedicated customer success and support services are provided. Netomi emphasizes that a strong Customer Success team comes with its AI solution to ensure ongoing success. From initial implementation through the life of the contract, Netomi's experts help configure the bot for new use-cases, provide training on best practices, and adjust the AI for changes in the business. Netomi has stated that true customer success "begins with our people and our implementation services in parallel with our AI", underlining that they work closely with clients to continually fine-tune and expand the solution over time.	netomi.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Enterprise-grade reliability and support SLAs. Netomi operates on a highly secure, scalable infrastructure (hosted on AWS) and is used by large enterprises, so it adheres to strict uptime and support commitments. The company has business continuity and disaster recovery plans in place to keep the service available. While specific SLA terms are not public, Netomi's SOC2 and ISO27001 compliance and use by mission-critical support teams imply strong uptime guarantees. Additionally, Netomi provides responsive support via its Customer Success team for any platform issues. (Contracts typically include uptime guarantees and support response time SLAs, as expected for an enterprise vendor, although the exact figures are provided during contracting.)	netomi.com

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	No	No public, transparent pricing; likely custom enterprise pricing. Netomi does not publish pricing details on its website – it operates on a custom quote model. This usually means pricing is tailored to each client's volume and requirements. While this allows flexibility (e.g. accommodating seasonal volume spikes in the contract), the exact structure isn't openly disclosed. There's no indication of a special pay-per-use scale for seasonality beyond what would be negotiated. Therefore, from an outside perspective, pricing isn't "transparent" in the sense of a clear list price or self-serve model; it's handled through enterprise sales proposals.	wheelhouse.com
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	No	No specific documentation of cost disclosures available. Since Netomi's pricing is custom, details about implementation fees or add-on costs are provided during the sales/proposal process rather than publicly. The website and official materials do not itemize these costs. Clients would need to discuss and review a proposal to see fees for professional services or expanding to additional channels. In short, costs are not transparently published, and one must rely on the sales quote to understand implementation and expansion pricing (Netomi's pricing page simply asks to "Contact Us – Get a Custom Quote", implying these details are handled case-by-case).	wheelhouse.com

Vendor Deep Dive

Kore AI

VOX Score	90.18/ 100
Coverage	18 / 20 questions "Yes"
HQ	Orlando, FL
Website	www.kore.ai

Talk to Kore AI: www.kore.ai

Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Kore AI

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	Kore.ai does not list a dedicated built-in disclosure feature. Developers can configure the virtual assistant's greeting to clarify it's a bot, but the documentation doesn't highlight an automatic AI disclosure mechanism. Kore.ai does stress transparency as a principle of responsible AI, yet no specific out-of-the-box notification is mentioned.	kore.ai
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Kore.ai meets major data compliance standards and offers features to help with AI compliance. The platform is GDPR-compliant and supports industry regulations like HIPAA and PCI. It also provides data handling controls (e.g. data retention policies) to facilitate requirements such as data deletion or "right to be forgotten" requests.	kore.ai kore.ai

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	Kore.ai's platform includes real-time sentiment analysis. The bot can monitor user emotion and trigger events based on negative sentiment or frustration. For example, if the user shows anger or repeats unhelpful inputs, the system can flag it and even escalate to a human agent automatically.	developer.kore.ai developer.kore.ai
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Kore.ai supports seamless live-agent handoff. Its virtual assistants can transfer conversations to human agents whenever needed (for instance, when the user requests a human or the bot detects high frustration). This live agent hand-off capability is a core function of Kore.ai's platform.	developer.kore.ai

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Kore.ai provides robust analytics to measure the AI's impact. The platform's dashboards include containment/deflection rates (how many sessions the bot handled vs. went to an agent) and other performance metrics. Case studies confirm improvements – for example, one customer saw a 24% drop in agent-handled calls within 30 days of bot deployment. (Average handle time and first-contact resolution improvements can be inferred from these analytics and customer results.)	developer.kore.ai kore.ai
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Kore.ai offers extensive agent-assist capabilities. Its AgentAssist feature gives live agents real-time AI support – for example, automatically pulling up customer info, suggesting next-best responses, and even providing one-click actions during a conversation. These AI-driven prompts and knowledge lookups help agents resolve issues faster and with more accuracy.	kore.aikore.ai

May 2025 CX-Leader Preference Map for Kore AI

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Kore.ai provides a documented integration framework and best practices for connecting to enterprise systems. The platform includes a Kore.ai Connector for secure integration with on-premise/legacy systems and comes with hundreds of prebuilt integrations for popular enterprise applications. This allows organizations to follow established patterns when integrating multiple CRMs, eCommerce platforms, etc., and Kore.ai's documentation covers how to leverage these tools.	developer.kore.ai kore.ai
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Kore.ai supports near real-time integration with major systems. It has prebuilt connectors/API integrations for popular CRMs, eCommerce, and data platforms, enabling the virtual assistant to fetch and update customer data on the fly. For example, Kore's AgentAssist can instantly look up customer records in a CRM during a conversation. With 75+ SaaS integrations and an open API, the platform ensures AI interactions use unified, up-to-date customer data for personalization.	kore.ai kore.ai

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Kore.ai does store conversation transcripts and provides granular access control. The Conversation History module lets authorized users review chat transcripts. Access to these records is protected by role-based permissions – for instance, an admin can enable or restrict the "View Bot Chat History" privilege for certain roles, ensuring that only approved personnel can see sensitive conversation data.	developer.kore.ai developer.kore.ai
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Kore.ai includes built-in tools to audit and ensure compliance of AI-driven interactions. The platform can automatically retain all user-bot messages for governance purposes, and it offers features like audit logs and e-discovery. These allow organizations to extract conversation records and review AI behavior for compliance – there's a chronological audit trail of key events and the ability to hold conversation data for legal/audit checks.	kore.aikore.ai

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Kore.ai's virtual assistants can handle common inquiries end-to-end. In retail use-cases, for example, Kore.ai RetailAssist bots enable customers to track orders, initiate returns/exchanges, place or cancel orders, etc., without human intervention. These assistants are "always-on" and capable of resolving such routine requests, thereby offloading a significant volume of tickets from live agents.	kore.ai
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Kore.ai supports dynamic personalization in its AI interactions. The platform can use customer context (purchase history, preferences) to tailor recommendations. In fact, Kore's retail AI solution highlights personalized product suggestions – the virtual assistant can recommend products or promotions based on each user's past behavior, without needing a human agent in the loop. This helps create a self-service experience that feels customized to the customer.	kore.ai

May 2025 CX-Leader Preference Map for Kore AI

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Kore.ai provides real-time analytics dashboards for its conversational AI. The platform's Analytics section includes dashboards for conversation outcomes (self-service success vs fallback/transfer), user metrics, and performance. It also has a Feedback Dashboard to track user satisfaction (NPS/CSAT scores, etc.) in real time. (Metrics like cart abandonment can be tracked by configuring custom events, though they are not a default metric.)	docs.kore.ai docs.kore.ai
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Kore.ai's out-of-the-box analytics focus on conversational metrics (e.g., intent success, containment, CSAT) rather than direct business KPIs like AOV or churn. The platform does allow creation of custom dashboards where such eCommerce KPIs could be incorporated if data is provided. However, there is no indication of native, automatic tracking of metrics like upsell conversion rates or average order value attributable to the bot – those would need to be measured via external analytics or custom integration.	developer.kore.ai

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Kore.ai is actively innovating in next-gen AI. In 2024 it launched GALE, a generative AI platform that lets companies build powerful LLM-driven agents. Kore.ai also emphasizes "agentic AI" – enabling more autonomous AI agents. Its platform supports multi-agent orchestration and autonomous task execution (agents that can perform tasks on users' behalf). Additionally, Kore.ai offers voice integration (e.g., voice virtual agents for contact centers), indicating a strong push into advanced conversational and agentic AI capabilities.	kore.ai kore.ai
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Kore.ai provides tools and services for ongoing optimization. The platform's ML engine supports continuous learning (it can even expand the bot's language understanding via unsupervised learning as users interact). Moreover, Kore.ai offers managed services for post-deployment optimization – their team can handle ongoing bot maintenance, retraining, and updates as the business evolves. This ensures the AI is regularly tuned for new product content or compliance requirements.	developer.kore.ai kore.ai

May 2025 CX-Leader Preference Map for Kore AI

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Kore.ai's professional services encompass the full solution lifecycle, including continuous support and training. They provide consulting and advisory services to plan chatbot strategy and use cases, development and implementation help, and managed services for ongoing enhancements. As part of managed services, Kore.ai offers ongoing maintenance and even employee training to adjust the AI solution for new business needs or seasonal changes.	kore.ai kore.ai
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Kore.ai offers enterprise-grade SLAs. The company provides 24/7 support with guaranteed response times as agreed in the SLA. The platform itself is designed for high reliability (Kore.ai undergoes SOC2 Type II audits for its cloud service, indicating a commitment to uptime and security). In practice, enterprise customers receive uptime/availability guarantees and prompt support response SLAs to ensure the AI solution's performance meets business-critical requirements.	kore.ai kore.ai

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Kore.ai advertises integrated, usage-based pricing with no hidden fees. In fact, they have introduced pay-as-you-go plans (especially for smaller deployments) to accommodate varying usage volumes. This flexible consumption-based model means customers pay for actual usage (e.g., conversations or minutes) which can scale during peak seasons. Kore.ai explicitly promotes "simple pricing with no hidden fees" on its pricing page. (Note: Enterprise pricing is typically custom-quoted, but the emphasis on transparency suggests seasonal volume considerations can be negotiated upfront.)	kore.ai
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Kore.ai appears to disclose all related costs clearly in their proposals. For example, in a public sector listing, Kore.ai enumerates what additional services or add-ons might entail extra costs (such as engaging a partner for custom work). This indicates that when they provide a proposal, they transparently outline implementation fees, ongoing support costs, and any optional expansion costs for new channels or features so that customers have a clear view of the total cost of ownership.	applytosupply.digitalmarketplace.service.gov.uk

Vendor Deep Dive

→ LivePerson

VOX Score	100 / 100
Coverage	20 / 20 questions "Yes"
HQ	New York, NY
Website	www.liveperson.com

📞 Talk to LivePerson: www.liveperson.com

👥 Ask VOX for Introduction

May 2025 CX-Leader Preference Map for LivePerson

1. Regulatory & Compliance Alignment	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	Yes	LivePerson emphasizes transparency in bot interactions. Best practices recommend clearly informing users they're chatting with a bot (AI) rather than a human. The Conversational Cloud lets brands configure bot profiles and greetings to identify the agent as a virtual assistant, ensuring customers are notified upfront that they are interacting with AI.	liveperson.com
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	LivePerson's platform includes tools to meet data privacy and compliance needs. For example, it offers a Personal Data Deletion API to comply with GDPR's "Right to be Forgotten," allowing permanent deletion of consumers' personal data (transcripts, PII, etc.) on request. LivePerson also signs BAAs for HIPAA compliance and adheres to regulations on user consent in channels like SMS. These features ensure AI conversations meet data-handling and privacy requirements.	developers.liveperson.com

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	Yes	LivePerson's Conversational Cloud tracks customer sentiment and conversation health in real time. It uses a proprietary Meaningful Conversation Score (MCS) to measure sentiment on each message and conversation, flagging negative experiences. Managers can see if a bot is failing or a user is frustrated (e.g., repeated misunderstandings) and intervene. LivePerson is also developing advanced Conversational Quality Indicators to detect when a dialog is stuck or needs adjustment, so the system actively monitors frustration signals and responds accordingly.	appsource.microsoft.com
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Seamless AI-to-human handoff is a core feature. Agents can monitor bot conversations in real time and intervene when necessary to maintain a good experience. The Conversation Builder includes an "Agent Transfer" action, and bots can be configured to automatically escalate if a user expresses frustration or requests a human. In practice, LivePerson's platform supports "human-in-the-loop" escalation – bots will intelligently route the conversation to a live agent (with context) whenever the bot cannot resolve the issue or the customer prefers a person.	appsource.microsoft.com

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	LivePerson provides robust analytics to quantify AI impact. The Conversational Cloud's Report Center tracks conversation outcomes and KPIs – e.g. how many inquiries the bot contained/deflected without agent involvement, changes in handle time, and resolution rates. Brands can see metrics like automated vs. agent-handled conversations, enabling calculation of deflection rates and improvements in first contact resolution. LivePerson also offers custom reports so companies can measure AHT reduction or FCR improvements specifically tied to bot usage. (Case studies confirm substantial deflection and FCR gains with LivePerson AI.)	appsource.microsoft.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Conversation Assist in LivePerson's platform is an AI agent-assist tool. It automatically recommends relevant answers and even bot hand-offs to human agents in real time, based on the customer's intent. Agents see suggested responses from knowledge bases or have the option to delegate the chat to a suggested bot for routine tasks. Agents can also search an on-demand knowledge widget for answers. These AI-driven recommendations help agents respond faster and more accurately, boosting productivity and consistency in live service.	developers.liveperson.com

May 2025 CX-Leader Preference Map for LivePerson

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	LivePerson provides extensive integration tools and guidelines for enterprise use. The platform includes open APIs, an Integration Hub, and LivePerson Functions (a serverless environment) to connect with legacy systems or multiple back-ends. Documentation offers best practices on when to use built-in API integrations vs. custom functions for complex, multi-step workflows. LivePerson also publishes integration guides for major systems (e.g. Salesforce, Zendesk) and emphasizes not hard-coding endpoints, using variables, and ensuring secure authentication – a clear methodology to integrate Conversational AI with enterprise data sources reliably.	developers.liveperson.com developers.liveperson.com
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	LivePerson supports real-time integrations with CRM, eCommerce and other systems to personalize conversations. For example, the Conversational Cloud app for Salesforce lets agents view and create Salesforce records from within LivePerson, syncing customer info (contacts, cases, orders) in real time. Conversational Cloud can also pull data via APIs during bot flows – brands use this to fetch order status, loyalty points, or product info on the fly. These integrations ensure the AI has up-to-date customer context (purchase history, profile details) so that bot responses and recommendations are personalized and consistent across systems.	developers.liveperson.com

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	LivePerson does store conversation transcripts and data, and it provides granular access controls. User roles and skills permissions determine who can view conversation history. For example, LivePerson supports Selective Transcript Masking: transcripts tied to sensitive skills can be automatically masked for agents who lack that skill, showing a "no permission" message. Administrators can assign permissions like "View Conversation History" only to certain roles. This role-based access ensures that personal customer data in transcripts is visible only to authorized personnel, protecting privacy.	community.liveperson.com community.liveperson.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	LivePerson enables thorough auditing of bot conversations through its analytics and oversight tools. All AI-led conversations are logged in transcripts and the Report Center, so brands can review any exchange for compliance. Additionally, LivePerson's new AI Annotator tool includes reporting features that show how bot conversations are being improved and where human agents influence bot behaviorsmartcustomerservice.com. This allows companies to track and document the chatbot's decision-making and ensure it aligns with compliance guidelines. In practice, brands use these transcript searches, conversation analytics, and AI Annotator reports to audit AI interactions and verify they meet regulatory and quality standards.	

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	LivePerson's AI chatbots are designed to handle FAQs and repetitive tasks end-to-end. As LivePerson notes, you can "fully automate FAQs, order status, account support, and other routine inquiries", freeing agents for more complex issues. With Conversation Builder templates (for example, an Order Status bot flow is provided out-of-the-box) and API integrations, the bot can lookup order details, process returns, or suggest products without agent intervention. This significantly deflects common contacts – in fact, LivePerson reports top brands containing up to ~30% of total inquiries fully within bots.	liveperson.com
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	LivePerson's bots can deliver personalized recommendations by leveraging customer data. The platform supports real-time data integration (from CRM, eCommerce, etc.), enabling the bot to tailor responses. For instance, LivePerson highlights that using real-time customer data allows personalized offers and recommendations based on a user's history, preferences, and context. The Conversational AI can suggest products or content specific to the individual – e.g. "Since you bought X, you might like Y" – during the chat. This dynamic personalization is built into the Conversation Orchestrator and Intent Manager features, which adapt bot replies to each user's profile and behavior, driving more relevant self-service experiences.	liveperson.com

May 2025 CX-Leader Preference Map for LivePerson

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	LivePerson has a Professional Services team that provides ongoing consulting and support throughout the AI solution's lifecycle. They don't just help with initial implementation – they also offer post-launch support to "support your ongoing operational excellence with our experts who know the complexities of Conversational AI". This can include periodic strategy reviews, bot performance tuning, and training your team on best practices as you expand use cases. LivePerson's experts can act as an extension of your team to adjust conversational flows for new business lines or prepare bots for peak seasonal volume. In short, continuous optimization and consulting are available to ensure the AI solution keeps pace with business evolution.	liveperson.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	LivePerson offers enterprise-grade SLAs for its Conversational Cloud. The platform is cloud-based with high-availability architecture, and LivePerson can commit to uptime guarantees (e.g., 99.9%+) as part of enhanced support packages. In terms of support responsiveness, LivePerson Customer Support is available 24/7 and has defined response time targets for different issue severities. (Their standard support policy provides 24x7 coverage via messaging and email.) Performance-wise, LivePerson's SLA and support agreements encompass the timely functioning of AI services – so if the bot or messaging experiences any critical issue, it's treated with highest priority. These guarantees are clearly outlined in customer agreements or enhanced support addendums, giving confidence in reliability and prompt support.	community.liveperson.com

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	LivePerson's pricing model is designed to be transparent with minimal surprise fees. According to LivePerson (as reported on G2), they have "Simple pricing. Minimal add-ons. No service fees.". Plans are flexible to accommodate businesses of different sizes – LivePerson has multiple edition tiers and usage-based pricing options. This means you can scale up during peak seasons (e.g., higher messaging volume) and scale down as needed. Any additional costs (for example, certain channels like SMS or WhatsApp pass-through fees) are clearly disclosed. Overall, LivePerson strives to make pricing predictable, so seasonal volume spikes won't lead to hidden charges beyond the agreed rate structure.	g2.com
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	LivePerson provides clear proposals that delineate one-time implementation fees, ongoing service fees, and any optional add-ons. For example, if a brand wants to add a new messaging channel, LivePerson's pricing documentation explicitly notes if there's an extra cost (e.g., it lists that Twitter (X) can be supported with additional fees). Professional service engagements (onboarding, training, bot building help) are quoted up front as separate line items. In short, all components – software subscription, services, and expansions – are transparently quoted. LivePerson's focus on simple pricing and minimal add-ons means that customers know in advance what each extra feature or service will cost, ensuring there are no surprises in the total cost of ownership.	liveperson.com

Vendor Deep Dive

→ Salesforce (Agentforce)

VOX Score	84.95 / 100
Coverage	17 / 20 questions "Yes"
HQ	San Francisco, CA
Website	www.salesforce.com

📞 Talk to Salesforce: www.salesforce.com

👥 Ask VOX for Introduction

May 2025 CX-Leader Preference Map for Agentforce

1. Regulatory & Compliance Alignment

	Yes/No	Details	Source(s)
Do you provide automated disclosures or notifications that inform customers they are interacting with an AI (as opposed to a human agent)?	No	We found no indication of a built-in automated disclosure feature. Agentforce acts as an autonomous virtual agent in customer interactions (engaging users 24/7 in natural language), but it is up to the business to brand or introduce the bot. There is no explicit system-provided message stating "this is an AI" by default.	salesforce.com/agentforce salesforce.com
Does your solution support specific compliance requirements for AI-driven conversations (e.g., data handling, "right to be forgotten," explicit consent for bot interactions)?	Yes	Yes. Salesforce's Einstein Trust Layer enforces data privacy and security for AI interactions. Every Agentforce interaction passes through this layer, which can mask PII and filter toxic content. It also ensures zero data retention by LLM providers. An audit trail of AI prompts/responses is stored in Salesforce's Data Cloud for compliance review. Salesforce documentation also describes tools to honor data deletion requests (right-to-be-forgotten) for Einstein features. (However, we did not find a native feature for handling explicit user consent; organizations would need to manage consent as part of their implementation.)	salesforce.com salesforce.com

2. Consumer Trust & Frustration

	Yes/No	Details	Source(s)
Do you track signals of user frustration (e.g., sentiment detection or repeated "unhelpful" responses) in real time?	No	Not by default. There's no evidence that Agentforce proactively monitors frustration in real-time during a conversation. While Salesforce AI can analyze sentiment in customer interactions (e.g. querying past transcripts to assess sentiment), we did not find a built-in feature of Copilot/Agentforce that detects user frustration live (such as repeated unhelpful replies or negative sentiment) and reacts to it automatically.	salesforce.com salesforce.com
Does your solution seamlessly hand off from AI to a live agent based on user frustration or preference?	Yes	Yes. Agentforce supports seamless escalation to human agents when needed. You can define rules/guardrails for when the AI should escalate to a human. In practice, if the bot cannot handle a query or the user requests a human, the conversation (with full context) can be transferred to a live agent. Salesforce highlights that you can configure clear handoff points to human employees to ensure a smooth transition.	salesforce.com/agentforce salesforce.com

3. Efficiency & ROI

	Yes/No	Details	Source(s)
Do you provide metrics on call/chat deflection, average handle time reduction, or first-contact resolution attributable to your AI tool?	Yes	Yes. Salesforce provides analytics to measure the AI's impact. Einstein Copilot Analytics offers a dashboard to track key usage metrics (e.g. interactions and success rates of the AI), helping quantify ROI. Moreover, Salesforce's own case study shows Agentforce resolving ~80% of customer inquiries without human intervention – a strong call deflection metric. While specific metrics like AHT reduction or FCR are not explicitly listed in documentation, the provided analytics and success-rate measurements allow customers to derive those (e.g. reduced agent workload and higher first-contact resolution via AI).	salesforce.com
Does your solution include AI-driven "agent assist" features (e.g., recommended responses, real-time knowledge lookups) to improve live agent productivity?	Yes	Yes. Einstein Copilot includes AI assistance for agents. It can recommend actions and content in real time to help agents work faster. For example, Copilot can surface one-click suggested actions like "summarize opportunity" or "draft an email" directly in the agent's workflow. Salesforce's platform also offers features like Einstein Article and Reply Recommendations (which suggest relevant knowledge articles or draft responses for support agents), enhancing live agent productivity by providing answers and context instantly.	salesforce.com

May 2025 CX-Leader Preference Map for Agentforce

4. Implementation & Integration Realities	Yes/No	Details	Source(s)
Do you have a documented approach or best practices for handling complex integrations with enterprise legacy systems, multiple CRMs, or other eCommerce platforms?	Yes	Yes. Salesforce provides a robust integration approach for Agentforce. The Agentforce Agent Builder allows use of low-code and pro-code tools (Flows, Apex code, MuleSoft APIs) to connect with external systems. This means you can invoke legacy systems or other platforms in real-time as part of an agent's actions. Salesforce documentation encourages using MuleSoft for complex enterprise integrations and provides best practices to ensure Agentforce can pull in data from various sources. In short, Agentforce is built to integrate with the broader IT ecosystem (including non-Salesforce systems) via APIs and middleware.	capterra.in
Does your platform integrate in near real-time with major eCommerce, CRM, or CDP solutions to ensure unified customer data for personalized AI interactions?	Yes	Yes. Agentforce is natively part of the Salesforce Customer 360 platform, so it has near-real-time access to CRM and CDP data (Salesforce Data Cloud). It can pull together data like purchase history, case history, and more on the fly. In a Salesforce case study, Agentforce is deeply integrated with Data Cloud, retrieving both structured and unstructured data (e.g. account records, purchase records, knowledge articles) in seconds to personalize responses. It also connects natively with Salesforce Commerce (for eCommerce) and can interface with other systems via APIs. This ensures the AI is operating on unified, up-to-date customer data across channels.	salesforce.com

5. Data Security & Privacy

	Yes/No	Details	Source(s)
Do you store customer conversation data (e.g., transcripts, personal info)? If so, do you offer role-based access controls for these records (i.e., restricting data visibility so only the appropriate team members or user roles have access)?	Yes	Yes. Einstein Copilot/Agentforce does store conversation data for auditing and improvement. Salesforce notes that all AI prompts and responses are captured in an audit trail stored in Data Cloud. These conversation records become part of the company's Salesforce data, so they are subject to the same role-based access controls and security model as other CRM data. Admins can control visibility via Salesforce's permissions (ensuring only authorized roles or users can view sensitive conversation logs). In essence, conversation transcripts are stored securely and can be access-restricted using Salesforce's profile/permission settings.	salesforce.com
Do you provide built-in or recommended tools for AI audit and compliance checks regarding customer interactions?	Yes	Yes. Salesforce has built-in tools for auditing AI interactions and ensuring compliance. As part of the Einstein Trust Layer, every AI-generated response is run through a safety checker (to flag toxic or biased outputs). All interactions are recorded in an audit log (with prompts and responses) that companies can review. Because these logs are stored in Data Cloud, you can also build reports or even set up automated alerts (with Salesforce Flow) based on the AI's outputs. These features allow organizations to conduct regular audits of AI conversations and ensure they meet compliance and quality standards.	salesforce.com salesforce.com

6. Improving Self-Service & Deflection

	Yes/No	Details	Source(s)
Does your AI solution fully automate common inquiries (e.g., order status, returns, product recommendations) to reduce live agent workload?	Yes	Yes. Agentforce is designed to autonomously handle common customer inquiries end-to-end. Salesforce provides out-of-the-box agent personas for these scenarios. For example, a Service Agent can resolve a wide range of routine service issues without human intervention. In Commerce use cases, a Buyer Agent helps customers track orders, process returns, and make purchases via chat. The Personal Shopper AI can provide product recommendations and assist with finding products. All these functions are fully automated by the AI, deflecting those tasks from live agents.	
Can your bot dynamically personalize product recommendations (e.g., using purchase history or preference data) to encourage self-service?	Yes	Yes. Personalization is a key capability of Einstein Copilot/Agentforce. The AI leverages CRM and CDP data (like past purchases, browsing history, and customer preferences) to tailor its responses. Salesforce's Personal Shopper agent exemplifies this: it offers personalized product recommendations and styling advice in conversation, using the customer's data context. Because Agentforce has access to Data Cloud, it can draw on purchase history in real time to suggest relevant products or solutions. This dynamic personalization helps drive self-service sales and upsells.	salesforce.com

May 2025 CX-Leader Preference Map for Agentforce

7. Measurement & Reporting	Yes/No	Details	Source(s)
Do you offer real-time reporting or dashboards to track key Conversational AI metrics (e.g., satisfaction scores, fallback rates, cart abandonment changes)?	Yes	Yes. Salesforce provides an analytics dashboard for Einstein Copilot usage. Administrators get a pre-built Copilot Analytics view to monitor metrics like how often the AI is used, number of interactions per user, and success rate of AI actions. These metrics can be used as proxies for things like fallback rate (success vs. failure of AI responses). While specific metrics such as "cart abandonment due to AI" or explicit CSAT scores are not mentioned in documentation, the platform gives the data needed to derive those insights. Users can also build custom reports combining AI interaction data with business outcomes (e.g., cart abandonment) since all data resides in Salesforce.	salesforce.com
Do you measure impacts on eCommerce KPIs like Average Order Value, cross-sell/upsell conversions, or churn reduction specifically tied to AI interactions?	Yes	Not out of the box. Salesforce has not advertised native tracking of specific eCommerce KPIs (AOV, upsell rates, churn) attributed solely to Copilot. The platform focuses on enabling those outcomes (for example, Agentforce can proactively address churn by detecting at-risk customers and sending offers). However, any measurement of AOV uplift or churn reduction would be something the business measures via their own analytics. We did not find a dedicated feature in Einstein Copilot that directly reports "AI-driven change in AOV or churn." So, these KPIs would need to be analyzed by the customer using Salesforce's broader reporting tools, rather than an automated Copilot report.	salesforce.com

8. Roadmap & Future Innovations

	Yes/No	Details	Source(s)
Are you actively developing or offering next-gen Conversational AI or agentic AI features (e.g., generative responses, advanced agentic AI capabilities, voice commerce integration)?	Yes	Yes. Agentforce is Salesforce's next-gen conversational AI platform, and it's rapidly evolving. It delivers generative AI responses and can autonomously perform tasks (the "agentic AI" concept). Salesforce's updates show Agentforce expanding beyond chat – for example, Agentforce 2dx allows embedding AI agents into any app or workflow. The Copilot is also available via voice (the Salesforce mobile app now supports voice-to-text conversations with Einstein Copilot). Moreover, Salesforce continues to add advanced features (reasoning engines, multi-step action planning, integrations with Slack, etc.) to push the envelope of what AI agents can do.	salesforce.com
Do you provide ongoing model training or optimization services to keep both your standard and agentic AI functionalities current with brand changes, product updates, or compliance shifts?	Yes	Yes. Rather than requiring manual model retraining, Salesforce provides tools for continuous optimization of the AI. Einstein Copilot (Agentforce) Studio allows admins to update the AI's prompts, skills, and knowledge base as things change. For instance, you can easily add new topics or actions when new products launch. Agentforce also includes evaluation and monitoring tools – you can test the AI on sample cases and see performance trends to refine configurations. Salesforce itself updates the underlying AI models and platform regularly, and customers can opt into improvements. For specialized help, Salesforce and its partners offer services to tweak and "re-tune" the AI agent as business needs evolve, but this is typically done through configuration (low-code changes) rather than custom model training from scratch.	salesforce.com

May 2025 CX-Leader Preference Map for Agentforce

9. Engagement Model & Support	Yes/No	Details	Source(s)
Do you offer continuous professional services, training, or consulting to adapt the AI solution as our business evolves (e.g., new lines of business, peak seasons)?	Yes	Yes. Salesforce and its ecosystem provide ongoing support to ensure the AI solution adapts with your business. Salesforce's Success Plans and Professional Services include AI expertise to help tune Agentforce for new use cases. They also have training resources like Trailhead Academy sessions specifically on Agentforce (for example, interactive workshops on implementing Agentforce for various domains). Additionally, many Salesforce consulting partners are experienced with Agentforce and offer continuous optimization services. In short, you won't be on your own – you can engage Salesforce's team or certified partners for ongoing training, consulting, and strategy as your usage of AI grows or changes.	trailheadacademy.salesforce.com
Are you able to provide reliable SLAs for system uptime, support responsiveness, and performance guarantees specifically for AI-driven customer interactions?	Yes	Yes. Salesforce provides enterprise-grade SLAs for its platform, which extend to AI features. The Salesforce platform has a proven 99.9%+ uptime track record, and customers can monitor uptime in real time on the Salesforce Trust site. In terms of support responsiveness, Salesforce offers tiered support plans (Standard, Premier, etc.) with defined response times for critical issues. While the SLA isn't unique to "AI interactions" (it covers the whole Salesforce service), the high availability and performance standards apply to Agentforce as it runs on the same trusted infrastructure. Salesforce's Master Service Agreement commits to commercially reasonable efforts for 24/7 availability with remedies if not met.	salesforce.stackexchange.com

10. Pricing & Total Cost of Ownership (TCO)

	Yes/No	Details	Source(s)
Do you offer transparent and flexible pricing that accounts for seasonal spikes or fluctuating volume, minimizing hidden fees?	Yes	Yes. Salesforce has introduced a transparent consumption-based pricing for Agentforce. Notably, every Salesforce customer can start using Agentforce on a free tier, and then pay-as-you-go per conversation after that. The rate starts around $2 per conversation/lead handled by the AI. This usage-based model inherently scales with volume – if volume drops, costs drop; if it spikes, you pay for the additional usage without needing a new contract. Pricing information is published on Salesforce's site, and tools like an ROI calculator are provided to estimate costs. There are no hidden fees mentioned; any optional add-ons (e.g., additional sandbox environments or premium support) are clearly outlined in Salesforce's pricing documentation.	salesforce.com
Are implementation, professional services, and potential expansion costs (e.g., adding new channels) clearly disclosed in your cost proposals?	Yes	Yes. Salesforce's sales proposals and documentation make the costs of implementation and extras transparent. The core Agentforce pricing is clear (as above), and if you require Salesforce Professional Services for implementation or customization, those would be specified as separate line items. Salesforce generally publishes the rates for Success Plans and any packaged services. For example, they announced an "AI Implementation Bundle" with discounted sandbox and licenses to help deploy Copilot – this kind of offer is communicated upfront. Additional channels (like deploying the bot on Slack or SMS) typically don't incur hidden fees beyond the usage costs or any connector licensing (which would be stated). In summary, Salesforce provides detailed quotes that spell out all components (software subscriptions, support, services) so you can anticipate the total cost of ownership without surprise fees.	salesforce.com

Contact Your Preferred Vendor

VOX reached out to every vendor profiled in this report and secured a primary point of contact who can answer both business and technical questions. Use the details below to initiate a conversation or follow up with any questions.

If a direct email is not listed, follow the vendor's demo / contact-us link or email our vendor coordinator at **jona.pinzon@voxwins.com** for an introduction.

Vendor	Primary Contact / Link
Forethought	Deon Nicholas — Founder & Executive Chair • deon@forethought.ai
Gladly	hello@e.gladly.com
Inbenta	Ethan Harsha — VP Sales Ops & Tech • ethan.harsha@inbenta.com
OneReach.ai	James Mitzel — Enterprise AE • james.mitzel@onereach.com
The Loops	Demo request → https://theloops.io/demo/
[24]7.ai	Contact → https://www.247.ai/contact-us/
Netomi	Demo request → https://www.netomi.com/request-demo
Kustomer	Demo request → https://www.kustomer.com/demo/
Quiq	Demo request → https://quiq.com/demo/
Agentforce	Contact → https://www.salesforce.com/form/agentforce

Contact Your Preferred Vendor

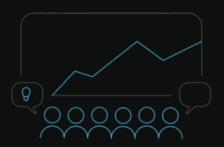| Vendor	Primary Contact / Link
LivePerson	Demo request → https://www.liveperson.com/request-demo/
Kore AI	Contact → https://www.kore.ai
Ada	Tatiana de Abreu — Partner Marketing Mgr • tatiana.deabreu@ada.support
Interactions	Joe Risgin — Dir. Growth & Innovation • jrisgin@interactions.com
IBM Watson	Jimmy King Jr — Sales Development • jimmy.king.jr@ibm.com
Gorgias	Fraser Bruce — Sr. Solutions Consultant • fraser.bruce@gorgias.com
eGain	Contact → https://www.egain.com/contact-us/
Capacity	Demo request → https://capacity.com/request-a-demo/
Aisera	Gary Pelczar — VP Alliances • gary.pelczar@aisera.com
Pypestream	Contact → https://www.pypestream.com
Rep AI	Aron Vuijsje — VP Sales • aron@hellorep.ai
Satisfi Labs	Demo request → https://satisfilabs.com/demo-request/
Siena AI	Andrew DeThomas — Sales Mgr • andrew@siena.cx
Freshworks	E. Akash Deep — Account Executive • akash.elichipuram@freshworks.com

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