

The RingCentral guide to AI-powered workforce engagement management



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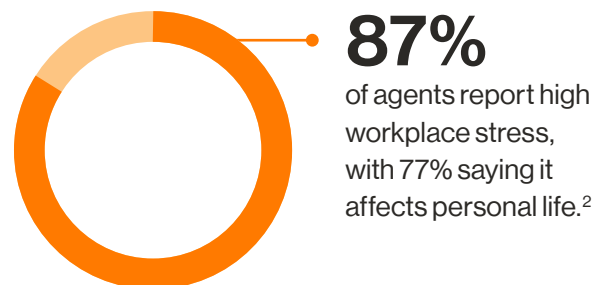
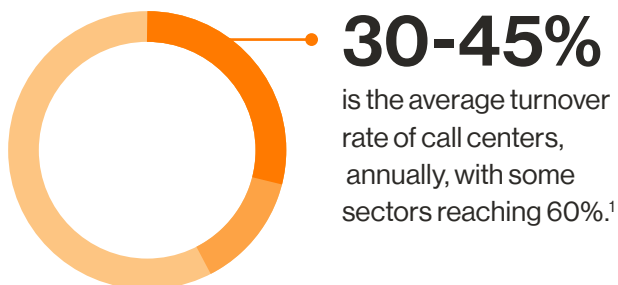
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Moving beyond traditional workforce optimization

Many organizations have adopted a workforce optimization (WFO) strategy to try to improve the performance of their contact center to satisfy the needs of customers as efficiently as possible. The focus is on contact center operations, with the goal to eliminate guesswork and reduce the effort required to consistently deliver exceptional service experiences to increase customer loyalty and revenue.

The problem is there are several variables in play within today's modern contact center that are inherent operational disruptors. For instance, high agent attrition is a major contributor to inconsistencies in performance and upsurges in costs. Having to constantly recruit, onboard, and train new agents is expensive with costs often reaching tens of thousands of dollars per agent. High turnover and burnout also make it difficult to maintain productivity and meet service level agreements (SLAs).



\$7,500 to \$28,000
is the typical range of hard costs associated with hiring and onboarding an agent; soft costs related to lost productivity can add as much as 60% to the hiring cost.⁴

13-15 months
is the average agent tenure dropped to just across the industry.³

Other problems plaguing many contact centers are the legacy systems, poorly integrated tools, and manual workflows in use that add delays and make it harder to identify and implement operational improvements. While AI, automation, and chatbots promise to address some of these issues, many centers struggle with adoption—it can be technically complex and costly to integrate features, such as conversational AI, predictive routing, or sentiment analysis. There's also a change-management challenge as employees resist new technologies for fear of job displacement.

78%

of respondents to a McKinsey study say their organizations use AI in at least one business function—most report using the technology in the IT, marketing, and sales functions, followed by service operations.⁵

71%

of Gen Z believe live calls are the quickest and easiest way to reach customer care and explain their issue; this preference is shared by 94% of baby boomers.⁶



A change is necessary: Introducing Workforce Engagement Management (WEM)

To address these challenges organizations are re-evaluating how they look at managing their contact center to take a more holistic approach. They see the central role employees play in the contact center's performance and are shifting their focus from operations to engagement.

Workforce Engagement Management (WEM) puts your employees in the center of your strategy. It is designed to help employees maximize their productivity and satisfaction, which ultimately leads to better overall performance and customer experiences. It requires a shift in mindset, from

managing forecasts, staffing numbers, and schedules, to finding ways to ensure employees are supported, valued, and motivated. It necessitates using technology, like AI and automation, to achieve speed and scale and empower agents (not replace), so they can work better, more efficiently.

This ebook delves into the three pillars of an effective Workforce Engagement Management strategy you can implement to improve:

- 1. Agent Performance**
- 2. Customer Satisfaction**
- 3. Operational Efficiency**



Driving agent performance

Intelligent quality management and coaching to elevate performance

Best practice: Implementing AI Quality Management (QM)

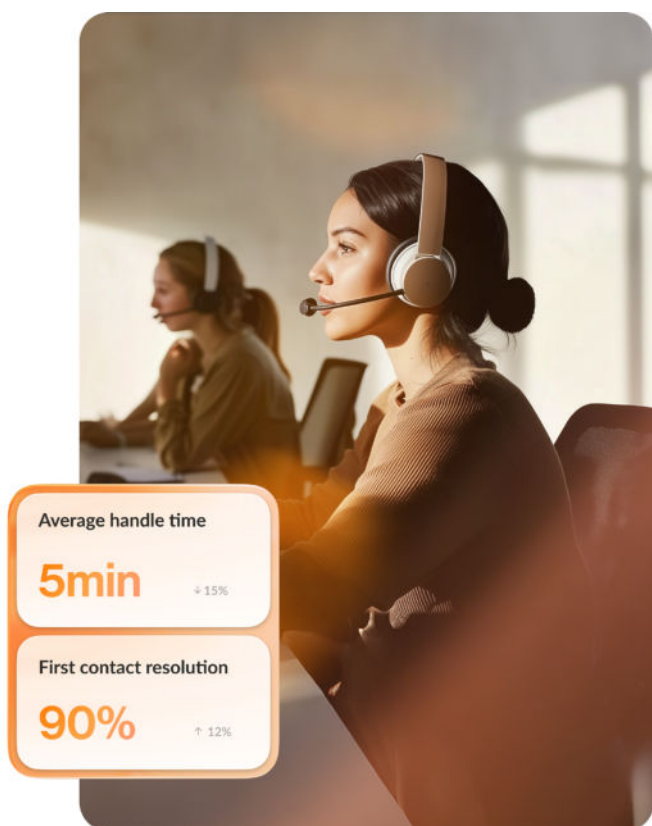
Traditional quality management has centered around compliance as organizations try to identify and address errors and demonstrate adherence to a certain standard of excellence. This is good, but not enough. You have an opportunity to get more from your quality management, changing it from a manual, compliance-driven task into an automated, coaching-focused engagement tool. This will help you turn quality monitoring into a dynamic tool for engagement and growth to elevate your contact center's performance.

Traditional quality management (QM) methods typically involve randomly sampling only 1-2% of all your agents' interactions. This manual sampling leaves a lot to chance and is prone to human bias, which can result in unfair assessments of agent performance and be slow to uncover and address any issues.

To address these challenges, you can implement AI-driven quality management that can score and analyze sentiment across 100% of your interactions. This approach enables the automatic identification of high-risk or emotionally charged interactions and can deliver instant, objective performance feedback, based on predefined parameters. As a result, agents receive fair and immediate evaluations, fostering a culture of continuous improvement and building trust.

Best practice: Integrating screen and desktop recording for context

Coaching is critical to improving the quality of agent interactions, fostering better communication and problem-solving skills that can lead to more efficient and empathetic customer interactions and first-contact resolutions. For coaching to be effective, however, supervisors need a complete view into the customer interaction—conversations alone don't tell the whole story.



Supervisors need context into exactly what the agent did and said, which is why organizations need to integrate screen and desktop recording to get the full understanding of the interaction. Reviewing desktop activity alongside the conversation allows supervisors to identify process bottlenecks or training gap and then provide specific feedback that is more actionable for the agent. This enhanced context shifts coaching sessions from focusing solely on “what was said” to examining “how problems were solved,” which significantly reduces ramp-up time for new hires and boosts agent confidence and effectiveness.

Elevating customer satisfaction

AI interaction analytics for better Customer Experiences (CX)

To better serve your customer, you need to know your customer. This requires visibility and analysis into the entire customer journey—every interaction is important, everything they tell you is a potential clue that can help you provide more tailored and effective support. Getting input from manual data collection, such as surveys, is just one component. Leading organizations look for customer satisfaction (CSAT) insights from 100% of interactions. This enables you to gain a more comprehensive understanding of your customers' needs and preferences that can lead to more proactive and satisfactory service delivery.

Best Practice: Leveraging post-contact surveys for immediate feedback

Every interaction is a moment in the customer's journey. Getting as much out of every moment is important, which is why post-contact surveys are a component of any organization's CSAT strategy. With short, channel-specific surveys, sent via SMS, IVR, or email, immediately after a customer interaction, you can quickly capture customer sentiment. This information can be used to give agents immediate feedback they can apply to improve future interactions. However, this approach has limitations, as it depends on a customer voluntarily completing the survey. Often, response rates can be low and skewed, as customers are most likely to fill out a survey when they have had an extremely good or bad interaction. As a result, it is important to note these surveys are an incomplete and sometimes inaccurate reflection of the entire customer lifecycle or customer base.

Best practice: Implementing predictive AI CSAT

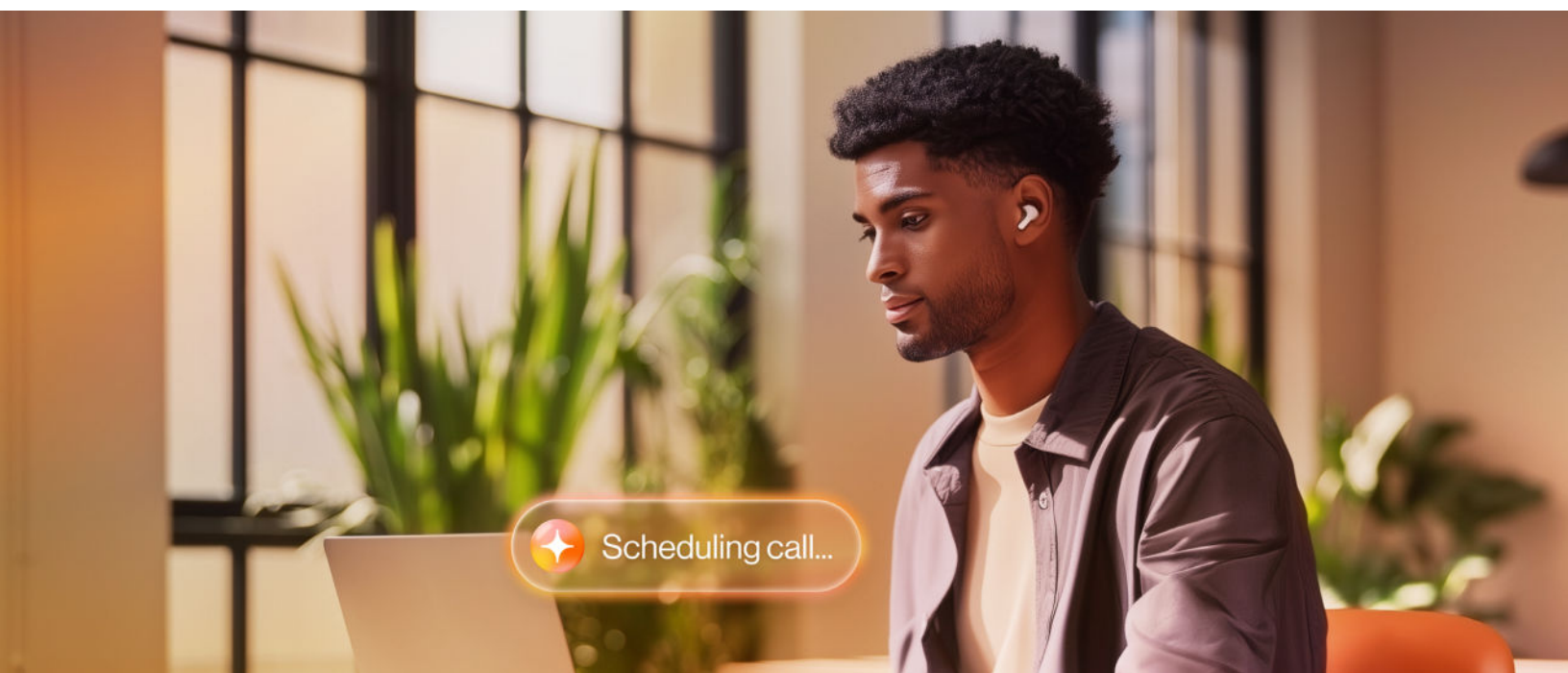
CSAT leaders go beyond manual surveys and apply AI to analyze every interaction. The AI predicts customer responses, answering the same questions a post-interaction survey would ask to give you an immediate and comprehensive view of what's happening in your contact

Best practice: Using AI analytics for greater insights into customer behavior

center. With this analysis you have a predictive edge you can use to rapidly identify at-risk customers and intervene to improve outcomes. For instance, low-score interactions can be flagged to a supervisor for immediate follow-up and service recovery. As a result, you can proactively improve CSAT scores, shifting the contact center's role from a cost center to a loyalty center that is focused on building lasting customer relationships.

Leaders often find themselves disconnected from the true voice of their customers and prospects, relying instead on anecdotal evidence from their teams or second-hand reports. While traditional dashboards can show what is happening—such as an increase in call volume—they fall short of explaining why these changes are occurring. Uncovering the “why” typically demands hours of manual data analysis or the support of a dedicated data analyst.

The solution lies in a single, intuitive dashboard that aggregates and visualizes macro-level trends from all conversations. Moving beyond simple data visualization, AI-powered dashboards can interpret charts, provide root cause analysis, highlight key takeaways, and offer specific recommendations. They also allow leaders to ask questions about their data using natural language to make insights more accessible and applicable. This allows you to eliminate ambiguity, making complex data instantly understandable and revealing the clear reasons, the “why”, behind the numbers. As a result, you can receive answers to strategic questions within seconds to empower more informed decision-making and take action to drive satisfaction improvements.



Optimizing resourcing efficiency

AI Workforce Management (WFM)

Best practice: Achieve accurate, multi-channel forecasting

Getting your contact center resources right is often a balancing act—overstaffing wastes budget, understaffing can lead to burnout and longer wait times. Legacy workforce management tools can make it hard to appropriately forecast and staff your contact center to meet ever-fluctuating traffic and call volumes. Worse yet, they rarely take into account what agents need. A modern, AI-powered workforce management solution is required to optimize your resources across multiple channels to meet service levels, while providing flexibility to meet the needs of agents.

One common challenge organizations face is blending interaction volume, channel type, and agent skill sets into a single, cohesive forecast. The solution to this lies in AI-enhanced forecasting, which leverages historical data and handling time variability alongside external factors, such as marketing campaigns, seasonality, to more accurately predict staffing requirements. This advanced approach helps prevent frustrating idle periods of low engagement as well as overwhelming workloads that can lead to agent burnout.

Best practice: Ensure proactive intraday management and adherence

To keep agents on track within WEM requires shifting the emphasis on adherence from reactive and punitive to proactive with a focus on real-time self-correction and coaching. You can use automated adjustment planning to enable preset schedules to be quickly modified when unexpected changes in demand arise. Agent schedules and shifts can be swiftly adjusted to ensure you maintain service level agreements (SLAs). You can send automated real-time nudges with private alerts to agents about minor deviations—such as starting a lunch break two minutes late—to give them the opportunity to correct their behavior independently before supervisor involvement becomes

Best practice: Empower agents with scheduling flexibility

necessary. As a result, supervisors spend less time policing schedules and more time coaching for quality, while agents feel trusted and maintain control over their adherence. This collaborative approach not only improves team compliance, but also delivers immediate business benefits by reducing staff attrition and minimizing overtime costs, generating a clear return on investment (ROI).

In today's workforce, flexibility has become imperative as modern agents increasingly value work-life balance and control over their schedules. WFM platforms need tools that can give agents more control and flexibility over their work schedule, such as agent self-service portals, shift-bidding, and voluntary time off (VTO). Leaders that offer agents these capabilities see a noticeable decrease in absenteeism and improved schedule adherence. It is seen as clear evidence the organization respects and values the agent's time, which, in turn, helps boost overall employee engagement and satisfaction.



The integrated WEM flywheel

The interconnectedness of the three pillars

When agents are engaged, they deliver a better customer experience. This improved customer experience, when paired with efficient scheduling, drives profitability and reduces churn. All together, these WEM pillars create a positive feedback loop that reinforces and enhances your overall business success.

AI Workforce Management

Predictable scheduling reduces resource costs and reduces agent burnout.

AI Quality Management

Engaged agents are more motivated to solve problems quickly and accurately.

How AI WEM
drives
profitability

AI Interaction Analytics

Better customer experiences reduce churn and makes contact volume more predictable.

The RingCX AI Workforce Engagement Management Suite

RingWEM combines each of these pillars into a comprehensive, AI-powered, Workforce Engagement Management suite. This cloud contact center solution gives you all you need to manage the entire employee lifecycle to improve agent experiences and reduce attrition rates. More satisfied and engaged employees lead to better overall performance and customer experiences that drive profitability. Some highlights of the WEM suite include:



AI Quality Management with Agent Screen Recording

With the ability to record calls and screens you have a reliable means of reviewing and improving the quality of agent and customer interactions. With RingCX you have all the essential tools you need to ensure that each call meets company and customer expectations. In addition, you can create and manage customizable review forms and scoresheets that help supervisors more accurately assess agent performance and provide coaching to improve agent performance. High quality interactions lead to positive employee and customer experiences.



AI Interaction Analytics and Surveys

Transform every customer conversation into business intelligence that drives growth and customer satisfaction. You can easily create and disseminate different surveys to capture customer feedback across channels and generate actionable insights agents can use to do better. Intuitive dashboards and visualization tools make it easy for you to spot trends, patterns, and anomalies in your interaction data, so you can predict customer needs, identify at-risk customers, and provide real-time guidance or intervention to improve outcomes. Sentiment analysis, intent recognition, and automatic categorization of interaction topics gives you actionable business intelligence you can use to make informed decisions to create exceptional experiences.



AI Workforce Management

Avoid staffing issues with smart forecasting tools that utilize artificial intelligence (AI) to generate flexible agent schedules based on historical data, seasonal information, and average handling times. Give your workforce the ability to trade shifts amongst themselves, letting them work out change of plans or scheduling conflicts. Reduce risk by simplifying compliance with appropriate labor standards, training and certification, sick leaves, healthcare requirements, and so on.

Next steps: Implementing your WEM strategy

If you are ready to start implementing your WEM strategy and would like to see how RingCX can help, please visit [here](#).

1. <https://www.insigniaresource.com/research/call-center-turnover-rates/>
2. <https://www.insigniaresource.com/research/call-center-turnover-rates/>
3. <https://www.insigniaresource.com/research/call-center-turnover-rates/>
4. <https://www.virtuallatinos.com/blog/cost-of-onboarding-a-new-employee/>
5. <https://www.mckinsey.com/capabilities/quantumblack/our-insights/the-state-of-ai>
6. <https://www.mckinsey.com/capabilities/operations/our-insights/the-contact-center-crossroads-finding-the-right-mix-of-humans-and-ai>

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