concentrix

# AI in CX: Your Enterprise Platform Evaluation Checklist

What to look for (and what to avoid) when evaluating AI CX platforms

## What Does “AI in CX” Mean?

AI in CX is basically a system where different AI helpers work together—and with real people—to get things done across all your customer touchpoints. Instead of relying on a bunch of one-off tools, it’s more like having a coordinator that manages multiple AI agents and knows when to bring humans into the loop. This means your operations stay reliable, you stay in control, and everything can grow with your business.

**Then**

- Chatbots
- Scripts
- Isolated automation
- Disconnected tools

**Now**

- Orchestrated platforms
- AI + humans + governance
- Continuous journeys

## Practical Pillars to Enable the Now

**Identity**
Confirm you’re interacting with the right person.

**Memory**
Retrieve relevant context about the customer.

**Intent**
Detect the purpose behind the interaction.

**Action**
Execute to resolve or advance the interaction.

**AI in CX has evolved from tools to platforms**

## The AI CX Platform Evaluation Checklist

To move beyond legacy approaches, you need to evaluate AI in CX across five platform dimensions.

### 1 Architecture & Modularity

- Independent AI agents that aren’t tightly linked
- Mix-and-match components
- Systems that speak the same language (e.g., MCP)
- Strict data separation between systems

**Why it matters:** Avoids monoliths and lets you add/replace capabilities without retraining everything.

### 2 Agentic Capabilities & Orchestration

- A coordinator that follows your rules
- Tasks that flow across channels and systems
- Built-in safety stops that hand off to humans

**Why it matters:** Turns outcomes into coordinated actions while keeping humans in control at the edges.

### 3 Human-in-the-Loop by Design

- Real-time assistance and override controls
- Explainability and decision visibility in the flow
- Coaching/QA embedded into advisor workflows

**Why it matters:** Human-centric design improves confidence, consistency, and time to proficiency.

### 4 Governance, Risk & Trust

- Identity, consent, audit trails, and policy enforcement
- Only trusted agents allowed, with clear permissions
- Monitoring for hallucination chains and model drift

**Why it matters:** Autonomy without control creates risk; controls without autonomy block value; evaluate both together.

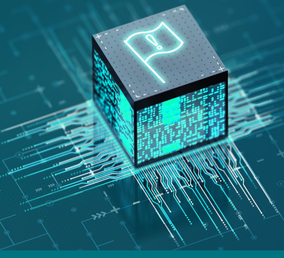
### 5 Operational Proof & Outcomes

- Live enterprise references beyond pilots
- Measurable impact on AHT, CSAT, FCR, proficiency
- Scales across journeys, not one-off use cases

**Why it matters:** Platforms proven in real operations outperform theoretical solutions.

**Identity and access management, consent capture, and auditability should be built into the platform from day one, not bolted on later.**

**Look for clear separation of controls, verified AI agents, built-in safeguards, and well-defined escalation paths so you can operate AI with confidence.**



## Red Flags to Watch For

- A single-channel chatbot with no orchestration
- Claims of “autonomous” operation without escalation or overrides
- No decision visibility, audit, or compliance model
- Demo-only; no production proof or time-to-value
- One-size-fits-all “retraining solves everything” vs. composable AI agents
- Unclear data boundaries; AI agents sharing context freely
- “Single pane of glass” UI with no intelligence layer beneath it
- Endless pilots that never operationalize or scale

**These are all reliable predictors of stalled adoption and avoidable risk.**

## Why Platforms Beat Point Tools

Enterprises that evaluate AI in CX as a platform, not a bundle of tools, reduce risk, accelerate ROI, and scale responsibly by aligning AI agent autonomy with human control and governance from day one.

A checklist-driven evaluation prevents costly missteps and pilot paralysis.

## The Path Forward

Ready to unlock the full potential of automation and empower your CX teams with AI tools for customer service that future-proof success, elevate quality, and turn every advisor into a hero?

**Get Started**

**Connect With Us**

concentrix

Learn more about how we can design, build, and run fully integrated, end-to-end solutions to support your entire enterprise, at speed and scale.

**+1 800-747-0583 | concentrix.com**

© 2026 Concentrix Corporation. All rights reserved.