The automation playbook

Achieving seamless self-service with AI



NiCE

Contents:

1 Introduction: Accelerating outcomes with purpose-built AI

2 Design for seamless self-service

3 Building the automation ecosystem

4 Operationalizing automation

5 Measuring success

6 Navigating the challenges

7 Conclusion

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Introduction: Accelerating outcomes with purpose-built AI

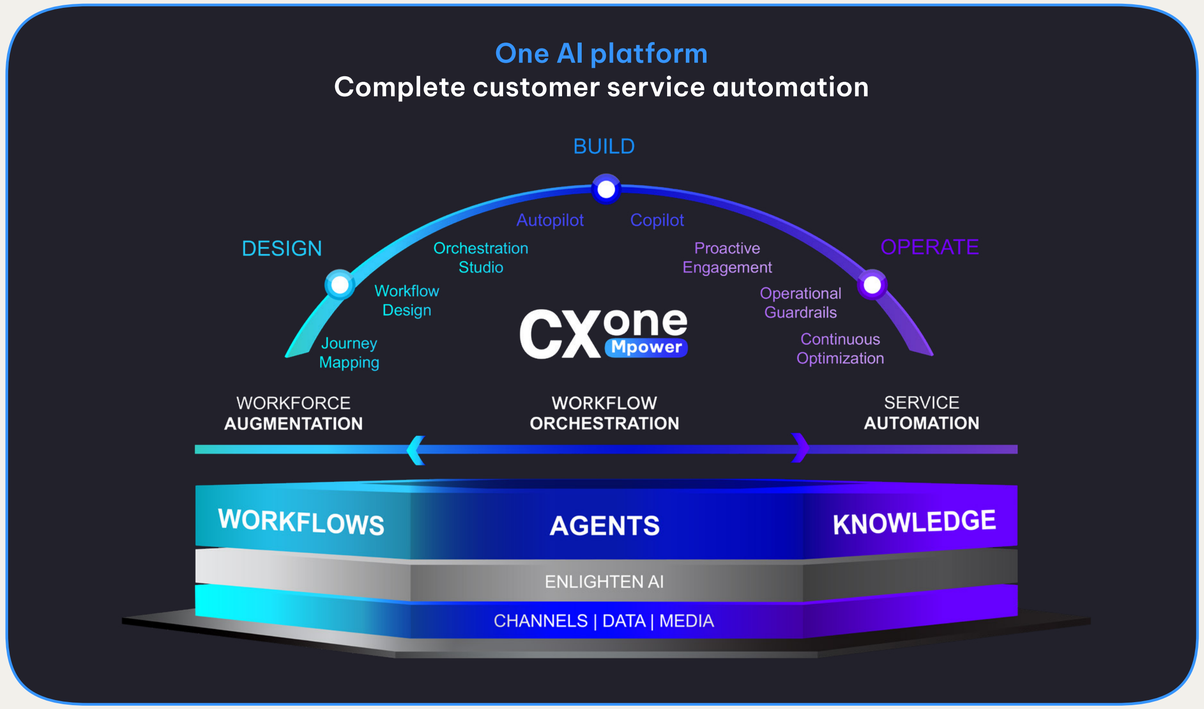
Customers know what AI can do, and they expect you to use it to deliver better CX. They want service faster, easier, and more personalized in every interaction.

The advent of AI has unlocked an unparalleled ability for companies to meet – and exceed – these heightened demands by rethinking traditional approaches and embracing the power of purpose-built AI to elevate customer service.

The goal of every forward-thinking business is to make their AI "invisible." This doesn't mean the technology disappears, but rather that it becomes so seamlessly integrated into the customer journey that interactions feel natural effortless. The result: personalized experiences for customers that resolve their needs fully and with unmatched precision for businesses to achieve total customer service automation.

At NiCE, we have built an AI-powered hyper platform, CXone Mpower, allowing all organizations to design, build, and operate their workflows, agents, and knowledge. By embedding our proprietary purpose-built AI, Enlighten, derived from the largest labeled and validated historical dataset of CX interactions, CXone Mpower connects the front- and back-office, eliminates data siloes, and empowers business leaders to create complex, personalized workflows for AI and human agents to automate customer service, exceed customer expectations, and drive ROI across the entire business.

This resource outlines top-priority challenges organizations face today and high-impact plays NiCE delivers to drive success across the entire businesswith purpose-built CX AI.



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Design for seamless self-service

Challenge #1 The overwhelmed customer

Simplified self-service systems reduce cognitive load, enabling customers to quickly and confidently resolve issues. This builds trust in your brand and increases adoption of selfservice channels, ultimately reducing operational costs and agent workloads.

The play: Simplification blitz

Objective:

Create systems that feel effortless and intuitive, minimizing customer effort while maximizing resolution speed.

Steps:

1. **Streamline workflows:** Use clear and simple navigation paths, reducing unnecessary steps that frustrate users.
2. **Empathize through design:** Deploy user-friendly interfaces and empathetic language to make interactions feel natural and supportive.
3. **Enhance accessibility:** Ensure all customers, regardless of device or technical skill, can easily engage with the system.

How NiCE helps run this play:

- **AI-Powered self-service:** Provides tools to designand optimize customer workflows for clarity and simplicity, ensuring smooth interactions from start to finish.
- **AI-Driven personalization:** NiCE AI analyzes interaction data to predict and tailor workflows to customer preferences, offering a user-centric experience.
- **Omnichannel accessibility:** NiCE solutions are built for cross-platform compatibility, allowing customers to engage seamlessly on any device.

Challenge #2 The disjointed journey

By ensuring consistent and cohesive customer experiences across channels, businesses build trust, reduce customer frustration, and increase loyalty. Customers are more likely to stick with brands that make interactions effortless, regardless of where they start or end.

The Omnichannel synchronization sweep

Objective:

Deliver a seamless experience across channels by unifying workflows and maintaining interaction context.

Steps:

1. **Unify customer data:** Leverage centralized databases to ensure continuity across touchpoints.
2. **Design for continuity:** Standardize messaging, visuals, and workflows across platforms for a familiar customer experience.
3. **Enable channel switching:** Allow customers to move between platforms (e.g., mobile to desktop) without restarting their interaction.

How NiCE helps run this play:

- **Omnichannel routing:** Enables consistent experiences by centralizing customer data and ensuring it travels with them across channels.
- **Unified interaction history:** NiCE stores and provides real-time interaction context, empowering agents and automated systems to pick up where the customer left off.
- **Cross-platform design capabilities:** NiCE ensures workflows and designs are optimized for both digital and voice channels, creating seamless transitions.

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Design for seamless self-service

Challenge #3 The uncertain ask

Anticipating and proactively addressing customer needs not only increases satisfaction but also reduces the time customers spend seeking solutions. This creates a positive perception of self-service as fast, effective, and reliable.

The play: Proactive intelligence drive

Objective:

Anticipate customer needs and guide them toward resolution with intelligent, tailored suggestions.

Steps:

1. **Use AI to predict needs:** Analyze customer behavior patterns to identify common problems and proactively present solutions.
2. **Offer tailored suggestions:** Provide personalized recommendations based on the customer's unique profile and history.
3. **Simplify decision-making:** Present a few curated options to help customers resolve their issues quickly.

How NiCE helps run this play:

- **AI-Powered insights:** NiCE AI uses predictive analytics to identify customer needs before they arise, offering personalized suggestions.
- **Powerful virtual agents:** These virtual agents adapt to individual customers' behaviors and preferences, guiding them through tailored solutions.
- **Journey analytics:** NiCE tracks and analyzes end-to-end customer journeys, providing actionable insights to refine and optimize proactive engagements.

Challenge #4 The failed handoff

A smooth transition from self-service to human agents enhances customer confidence and trust, reducing frustration. It also allows agents to focus on resolving issues effectively, leading to faster resolution times and improved agent efficiency.

The play: Seamless handoff formation

Objective:

Ensure seamless transitions between AI-driven self-service and human assistance by maintaining context and continuity.

Steps:

1. **Preserve interaction histories:** Share complete interaction details with human agents to eliminate the need for customers to repeat themselves.
2. **Enable intelligent routing:** Use AI to match customers with the best-suited agent for their issue.
3. **Communicate transparently:** Keep customers informed during escalations to manage expectations and reduce anxiety.

How NiCE helps run this play:

- **Interaction history sharing:** Provides agents with full visibility into the customer's self-service journey, reducing resolution time.
- **Intelligent routing:** Matches customers to the most appropriate agents using advanced analytics and customer profiles.
- **Proactive engagement:** NiCE tools keep customers informed of the escalation process, building trust and setting clear expectations.

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Building the automation ecosystem

Challenge #1 Fragmented systems

Disconnected systems lead to inefficiencies, errors, and inconsistent customer experiences. By integrating workflows, data, and tools into a unified ecosystem, businesses can streamline operations, reduce redundancies, and deliver consistent service across channels.

The play: The unified platform push

Objective:

Consolidate systems into an integrated platform that enables seamless operations and end-to-end visibility.

Steps:

1. **Centralize workflows:** Combine disparate tools and processes into a single, cohesive platform for unified execution.
2. **Streamline data sharing:** Ensure customer data flows seamlessly between systems to eliminate gaps and redundancies.
3. **Enable cross-department collaboration:** Use centralized tools to align customer service, back-office, and operational teams.

How NiCE helps run this play:

- **A true cloud platform:** Provides a fully integrated ecosystem that unifies customer service operations across departments.
- **Omnichannel data integration:** NiCE centralizes customer interaction data from all channels, ensuring a single source of truth.
- **Workflow automation:** NiCE allows teams to design, build, and optimize workflows that span the entire customer journey.

Challenge #2 Inconsistent scaling

As businesses grow, so does the demand for consistent and high-quality customer service. Scalable systems ensure that increased volumes don't compromise service quality or customer satisfaction, maintaining efficiency under pressure.

The play: The scalability drive

Objective:

Build systems capable of maintaining precision and performance at scale.

Steps:

1. **Design for growth:** Implement flexible tools and processes that can scale with business needs.
2. **Automate high-volume tasks:** Use automation to handle repetitive processes and high-frequency inquiries.
3. **Monitor performance metrics:** Continuously evaluate scalability metrics, such as response times and resolution rates, to ensure quality.

How NiCE helps run this play:

- **Scalable cloud infrastructure:** Built to handle millions of interactions daily without compromising performance or reliability.
- **AI-Powered automation:** Automates routine tasks, such as FAQs and transactional requests, to free up resources for complex issues.
- **Performance analytics:** NiCE tools provide real-time insights into system performance, ensuring scaling efforts don't impact customer satisfaction.

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Building the automation ecosystem

Challenge #3 Inefficient processes

Inefficient workflows waste time and resources, frustrating both customers and employees. By optimizing processes, businesses can reduce handling times, improve resolution rates, and enhance the overall customer experience.

The play: The optimization blitz

Objective:

Continuously refine workflows to improve efficiency and effectiveness.

Steps:

1. **Map current processes:** Identify inefficiencies and bottlenecks in existing workflows.
2. **Apply AI insights:** Use data-driven recommendations to streamline steps and eliminate redundancies.
3. **Test and iterate:** Continuously refine processes based on real-world performance metrics and feedback.

How NiCE helps run this play:

- **Journey analytics:** Provides insights into customer interactions, highlighting inefficiencies and optimization opportunities.
- **AI-Driven workflow optimization:** NiCE AI recommends adjustments to streamline processes and reduce handling times.
- **Orchestration studio:** Allows businesses to design, test, and implement optimized workflows with minimal disruption.

Challenge #4 Limited proactive engagement

Proactive engagement improves customer satisfaction by addressing needs before they becomeproblems. This reduces inbound inquiries, enhances loyalty, and positions the brand as attentive and customer-centric.

The play: Proactive AI engagement formation

Objective:

Anticipate customer needs and engage proactively to improve satisfaction and reduce friction.

Steps:

1. **Leverage predictive analytics:** Use AI to identify patterns and predict customer issues before they occur.
2. **Automate outreach:** Send proactive notifications, reminders, or support messages to address potential concerns early.
3. **Close the loop:** Ensure customer can easily take action or escalate if necessary, maintaining engagement and satisfaction.

How NiCE helps run this play:

- **Proactive engagement tools:** NiCE enables personalized, AI-driven outreach to preempt customer concerns.
- **Predictive analytics:** Identifies customer behavior trends to trigger proactive interventions.
- **Omnichannel communication:** Ensures proactive messages reach customers on their preferred channel, whether email, SMS, or app notifications.

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Operationalizing automation

Challenge #1 Inefficient processes

Inefficient workflows drain resources, frustrate customers, and create unnecessary complexity. Optimized workflows, driven by automation, ensure tasks are completed quickly and accurately, freeing teams to focus on strategic initiatives.

The play: The workflow optimization huddle

Objective:

Streamline and adapt workflows to eliminate redundancies and improve overall efficiency.

Steps:

1. **Analyze interaction patterns:** Use data to identify bottlenecks and areas for improvement, such as frequent customer drop-off points in self-service flows.
2. **Automate redundant tasks:** Integrate systems to automate repetitive processes, such as syncing customer updates from chatbots to backend databases.
3. **Continuously refine workflows:** Test, analyze, and iterate workflows to ensure they remain relevant and effective as customer needs evolve.

How NiCE helps run this play:

- **Journey analytics:** Provides realtime insights into customer journeys, pinpointing inefficiencies and opportunities for improvement.
- **Orchestration studio:** Enables businesses to design and refine workflows quickly, minimizing disruptions and maximizing adaptability.
- **AI-Driven optimization:** NiCE AI continually evaluates workflows, suggesting data-driven improvements to enhance efficiency.

Challenge #2 Overwhelmed teams

Automation doesn't just reduce workloads; it empowers employees to focus on meaningful, high-value tasks. When teams feel supported by automation, they perform better, experience less burnout, and deliver higher-quality customer experiences.

The play: The empowered workforce formation

Objective:

Use automation tools to augment human capabilities and support employees in their roles.

Steps:

1. **Deploy agent copilots:** Provide agents with AI-powered assistance, such as suggested responses, real-time insights, and next-step recommendations, to increase accuracy and speed.
2. **Utilize supervisor dashboards:** Equip supervisors with real-time performance metrics and analytics to manage workloads effectively and offer targeted coaching.
3. **Create collaboration opportunities:** Foster a culture where teams collaborate with automation tools, enhancing both efficiency and decision-making.

How NiCE helps run this play:

- **AI-Powered agent copilots:** NiCE delivers context-driven suggestions, enabling agents to resolve inquiries faster and with greater accuracy.
- **Supervisor dashboards:** NiCE provides supervisors with actionable insights, helping them identify trends, balance workloads, and guide teams effectively.
- **Workforce engagement solutions:** NiCE empowers employees by aligning automation tools with their workflows, creating a supportive environment for collaboration.

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Operationalizing automation

Challenge #3 Limited human-AI synergy

Automation alone cannot solve every problem, and humans alone cannot scale to meet demand. Combining the strengths of both creates a powerful synergy that elevates efficiency, accuracy, and customer satisfaction.

The play: The human-AI collaboration pass

Objective:

Foster seamless collaboration between humans and AI, leveraging the strengths of both to deliver superior outcomes.

Steps:

1. **Automate routine tasks:** Assign repetitive, transactional tasks (e.g., password resets, order tracking) to AI, allowing agents to focus on more complex and nuanced issues.
2. **Enable contextual escalations:** Ensure AI collects and shares all relevant interaction history when escalating to human agents, reducing repetition and frustration.
3. **Support complex decision-making:** Use AI insights to guide agents in handling unique or high-stakes situations, enhancing accuracy and customer confidence.

How NiCE Helps Run This Play:

- **Routine task automation:** NiCE automates common customer inquiries, streamlining interactions and reducing agent workloads.
- **Seamless context sharing:** NiCE ensures that all relevant interaction history is transferred during escalations, empowering agents to provide informed assistance.
- **AI-driven decision support:** NiCE AI provides actionable recommendations, enhancing human decision-making in complex scenarios.

Challenge #4 Static systems

Static, outdated systems fail to adapt to changing customer needs or business priorities. Dynamic, self-optimizing systems ensure automation remains relevant, effective, and aligned with organizational goals.

The play: The adaptive automation plan

Objective:

Build dynamic systems that adapt in realtime to customer behaviors and evolving business needs.

Steps:

1. **Monitor customer behaviors:** Use AI to dentify trends and adjust workflows in response to customer needs.
2. **Integrate real-time feedback:** Continuously refine processes based on performance metrics and user feedback.
3. **Future-proof Systems:** Regularly update automation infrastructure to align with advancements in technology and shifting customer expectations.

How NiCE helps run this play:

- **Real-time analytics:** NiCE monitors customer interactions and provides actionable insights to keep systems aligned with real-world needs.
- **Self-optimizing workflows:** NiCE AI dynamically adjusts workflows, ensuring they remain efficient and effective over time.
- **Scalable infrastructure:** NiCE's cloudbased platform evolves with your business, offering flexibility and adaptability as demands grow.

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Measuring success

Challenge #1 Lack of visibility into performance

Without clear metrics, businesses struggle to understand the impact of automation or identify areas for improvement. Measuring operational performance allows organizations to optimize processes, improve efficiency, and enhance the customer experience.

The play: The operational metrics rush

Objective:

Establish key performance indicators (KPIs) to measure and improve the efficiency of automation.

Steps:

1. **Track eficiency metrics:** Monitor reductions in Average Handle Time (AHT) and After-Call Work (ACW) to evaluate how well automation systems streamline workflows.
2. **Analyze productivity gains:** Measure agent workloads and time savings to assess how automation supports team performance.
3. **Implement real-time dashboards:** Provide teams with visibility into metrics, enabling proactive adjustments and improvements.

How NiCE helps run this play:

- **Performance analytics tools:** NiCE provides dashboards to monitor KPIs such as AHT and ACW in real time, offering actionable insights.
- **Workforce optimization solutions:** Streamline agent workflows by integrating automation insights with performance management tools.
- **Journey analytics:** Enables businesses to track the entire customer journey and identify inefficiencies impacting operational performance.

Challenge #2 Weak customer sentiment insights

Automation's success ultimately depends on how customers perceive their experiences. Tracking sentiment and satisfaction metrics ensures businesses can refine systems to meet evolving customer expectations and foster loyalty.

The play: The empowered workforce formation

Objective:

Use customer sentiment data to evaluate the effectiveness of automation and identify opportunities to enhance the experience.

Steps:

1. **Measure NPS trends:** Track changes in Net Promoter Score (NPS) to gauge customer loyalty and likelihood to recommend.
2. **Analyze sentiment data:** Use AI to assess the tone, emotion, and feedback from customer interactions.
3. **Identify pain points:** Pinpoint areas where automation creates frustration or gaps, and make targeted adjustments.

How NiCE helps run this play:

- **AI-powered agent copilots:** NiCE delivers context-driven suggestions, enabling agents to resolve inquiries faster and with greater accuracy.
- **Supervisor dashboards:** NiCE provides supervisors with actionable insights, helping them identify trends, balance workloads, and guide teams effectively.
- **Workforce engagement solutions:** NiCE empowers employees by aligning automation tools with their workflows, creating a supportive environment for collaboration.

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Measuring success

Challenge #3 Unclear financial outcomes

Automation investments must deliver clear financial benefits, such as cost savings and revenue growth. By quantifying ROI, businesses can validate their strategies and make datadriven decisions for future investments.

The play: The ROI play action

Objective:

Demonstrate the financial impact of automation by quantifying cost reductions and revenue gains.

Steps:

1. **Calculate cost savings:** Track reductions in operational expenses from streamlined workflows and fewer manual tasks.
2. **Monitor revenue growth:** Attribute increases in customer lifetime value (CLV) and retention rates to enhanced automation-driven experiences.
3. **Benchmark against peers:** Compare ROI metrics to industry standards to evaluate competitive positioning.

How NiCE helps run this play:

- **Cost efficiency analytics:** NiCE calculates savings from automationdriven reductions in manual work and agent time.
- **Revenue attribution tools:** Link improved customer satisfaction and loyalty to revenue growth metrics, showcasing automation's tangible impact.
- **Benchmarking with industry insights:** NiCE provides comparative data, helping businesses understand how their ROI measures up to industry leaders.

Challenge #4 Stagnant systems

Automation systems must evolve with customer behaviors and business needs. Regularly refining processes ensure that automation remains effective, relevant, and aligned with organizational goals.

The play: The performance refinement plan

Objective:

Continuously improve automation systems by using real-world data and feedback to optimize workflows and customer experiences.

Steps:

1. **Implement feedback loops:** Use customer surveys and agent input to identify improvement areas.
2. **Analyze interaction data:** Leverage AI insights to pinpoint inefficiencies and adapt workflows accordingly.
3. **Benchmark regularly:** Compare performance metrics against industry standards to maintain a competitive edge.

How NiCE helps run this play:

- **Customer feedback tools:** NiCE captures input from customers and agents, integrating it into workflow refinement processes.
- **Journey analytics for continuous improvement:** Tracks interaction data, highlighting opportunities for system optimization.
- **Real-time benchmarking:** NiCE provide comparative insights, ensuring businesses remain competitive in their automation strategies.

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Navigating the challenges

Challenge #1 Employee resistance to change

Overcoming resistance ensures that employees view automation as a tool for empowerment rather than a threat. By fostering trust and ownership, businesses can unlockthe full potential of automation and create a collaborative, innovation-driven culture.

The play: The change management formation

Objective:

Build trust and enthusiasm for automation by involving employees and highlighting its benefits.

Steps:

1. **Engage stakeholders early:** Include employees in planning and decisionmaking to foster a sense of ownership. Communicate how automation reduces workloads and allows them to focus on strategic tasks.
2. **Highlight quick ins:** Share success stories and metrics to show how automation enhances efficiency and effectiveness without replacing human contributions.
3. **Provide comprehensive training:** Equip teams with the skills and knowledge to work alongside automation, and offer ongoing support to address concerns.

How NiCE helps run this play:

- **Workforce engagement solutions:** NiCE enables collaboration through tools that streamline workflows and highlight the complementary roles of humans and automation.
- **Performance metrics:** Real-time data demonstrates how automation reduces workloads and improves team outcomes, offering tangible proof of its benefits.
- **Training and adoption programs:** NiCE offers resources to help teams understand and adopt automation tools, ensuring smooth integration.

Challenge #2 Privacy and data security concerns

Ensuring data privacy and security builds customer trust and mitigates compliance risks. A strong data protection strategy fosters confidence in automation systems, reducing friction during implementation and enhancing long-term credibility.

The play: The data privacy shield

Objective:

Protect customer data and maintain compliance with regulatory standards to build trust and reduce risks.

Steps:

1. **Implement data encryption:** Use robust encryption protocols to secure data at all stages, from storage to transmission.
2. **Set up access controls:** Restrict access to sensitive data to authorized personnel only, minimizing breach risks.
3. **Maintain regulatory compliance:** Stay updated on laws like GDPR and CCPA, and implement practices to exceed these standards.

How NiCE helps run this play:

- **Robust data encryption:** NiCE ensures customer data is encrypted at every stage, safeguarding sensitive information.
- **Granular access controls:** NiCE tools provide detailed permissions settings, allowing businesses to limit data access based on roles and responsibilities.
- **Built-in compliance features:** NiCE automation systems come with preconfigured compliance tools to meet global and regional regulatory requirements.

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Navigating the challenges

Challenge #3 Complex regulatory environments

Different regions and industries have unique regulatory requirements. Automation systems must adapt to these complexities to avoid penalties and maintain customer trust. Navigating compliance effectively positions businesses as responsible and trustworthy.

The play: The compliance adaptability play

Objective:

Ensure automation systems are flexible and capable of meeting diverse regulatory requirements across multiple jurisdictions.

Steps:

1. **Partner with compliance experts:** Conduct regular audits to align automation systems with evolving regulations.
2. **Leverage built-in compliance tools:** Use AI systems that integrate compliance checks to minimize risks and simplify adherence.
3. **Document processes thoroughly:** Maintain records of compliance activities to demonstrate adherence during audits and reviews.

How NiCE helps run this play:

- **In compliance checks:** NiCE AI ensures systems align with industry standards and regulatory requirements, reducing the complexity of compliance management.
- **Audit support tools:** NiCE helps businesses document and monitor compliance activities for transparency and accountability.
- **Global adaptability:** NiCE automation tools are designed to adapt to regional and industry-specific regulations, ensuring seamless operation in complex environments.

Challenge #4 Building customer trust

Customer trust is critical to the success of automation. Transparent communication about how automation works, its benefits, and data protection measures ensures customers feel confident engaging with automated systems.

The play: The trust building strategy

Objective:

Foster transparency and confidence in automation by clearly communicating its purpose and benefits.

Steps:

1. **Communicate clearly:** Explain how automation enhances customer service and protects data in an accessible and straightforward way.
2. **Provide opt-out options:** Allow customers to opt out of automated processes, giving them control over their interactions.
3. **Proactively address incidents:** If data issues arise, act quickly to resolve them and communicate openly to maintain credibility.

How NiCE helps run this play:

- **Customer-centric automation tools:** NiCE enables businesses to customize automation solutions, ensuring they align with customer preferences and expectations.
- **Transparency features:** NiCE provides clear, customizable messaging to communicate the purpose and benefits of automation.
- **Incident management support:** NiCE tools help businesses monitor and respond to data incidents quickly, maintaining customer trust during challenging situations.

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Conclusion

The possibilities of automation extend far beyond operational efficiency. At its heart, automation is about delivering better experiences — making interactions faster, more intuitive, and more personalized for every customer. It empowers organizations to meet rising expectations while unlocking new levels of scalability and innovation.

Key takeaways:

Customer-centric automation:

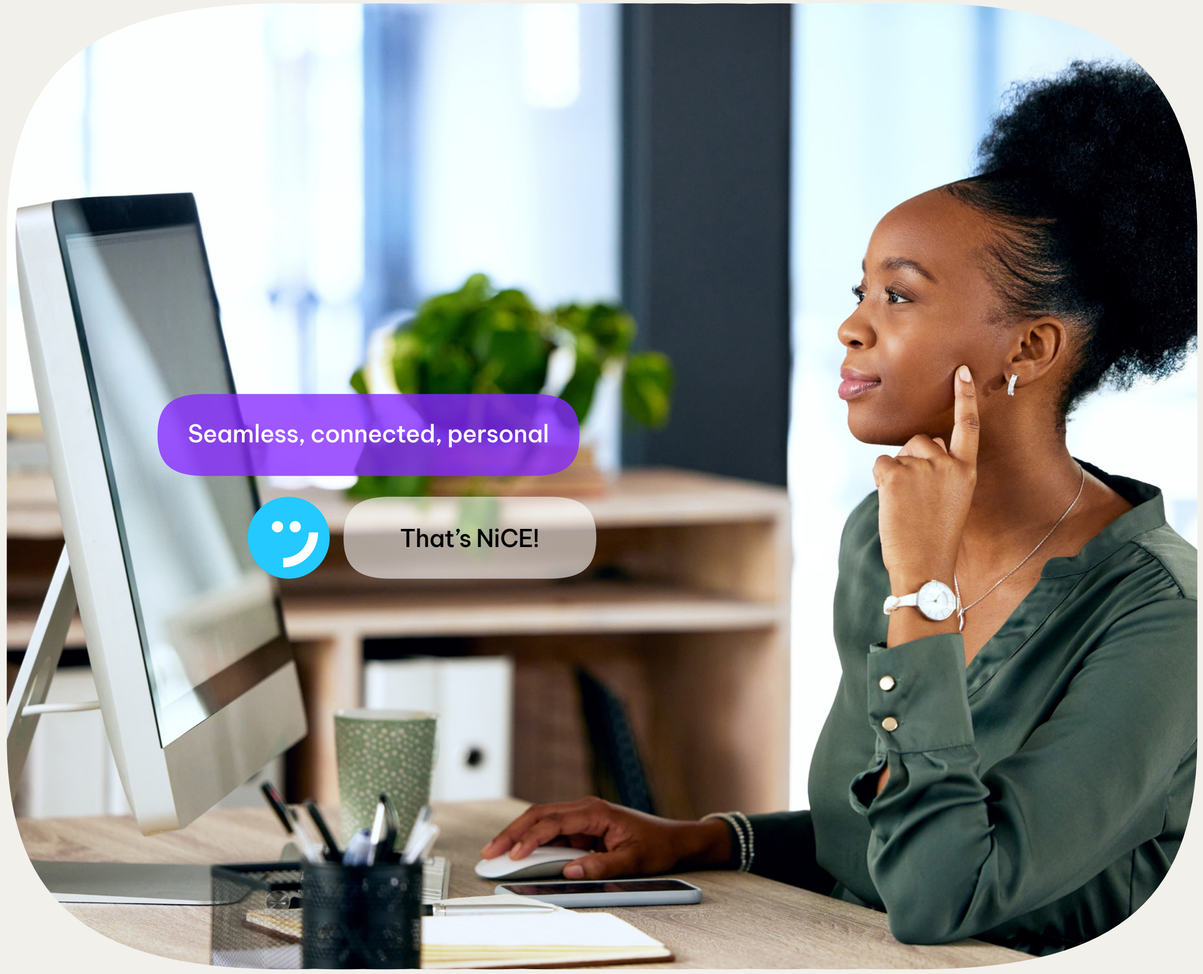
Successful automation begins with the customer. Every workflow, system, and tool should be designed to enhance their experience.

Continuous improvement:

Automation is not a one-time implementation but an ongoing journey of optimization and adaptation.

Human-AI collaboration:

The synergy between automation systems and human expertise is where the true power of automation lies.



Armed with this playbook, you are ready to transform your approach to customer service. By embracing automation thoughtfully and strategically, your organization can lead the way in delivering seamless, impactful customer experiences.

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The automation playbook

Achieving seamless self-service with AI

NiCE

About NiCE

NiCE is transforming the world with AI that puts people first. Our purpose-built AI-powered platforms automate engagements into proactive, safe, intelligent actions, empowering individuals and organizations to innovate and act, from interaction to resolution. Trusted by organizations throughout 150+ countries worldwide, NiCE's platforms are widely adopted across industries connecting people, systems, and workflows to work smarter at scale, elevating performance across the organization, delivering proven measurable outcomes.

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