

4 Major Silos Hurting Your Customers, Agents, and Business

And Steps to Shatter Them with Agentic AI

Optimize. Synergy. Pivot. Disrupt. Streamlined. Words like these are used so often in business that we've lost sight of their true meaning.

Unfortunately, silo is another word that's entering this territory. CX leaders have become so used to hearing about silos that they often fail to grasp the gravity of their impact until it's too late.

Studies show that knowledge workers spend roughly 30% of their work week searching for information trapped inside organizational silos, which creates bottlenecks and hampers decision-making. Employee disengagement is also exacerbated, with 79% of workers feeling their efforts are hindered by lack of visibility across siloed teams.

This in turn creates blind spots that hurt the customer experience, damaging loyalty and retention. The end result? IDC Market Research estimates that up to 30% of a company's revenue is lost each year to inefficiencies stemming from isolated or siloed data.

So, what we're saying is, silos are serious. And while they may sound like "old news," there is a new(ish) way for CX leaders to knock them over: generative AI (GenAI). Leveraging large language model (LLM) powered AI agents can bridge these gaps, enhancing customer satisfaction, loyalty, and lifetime value, while empowering teams to deliver exceptional service and seamless journeys.

After driving home the criticality of four major CX silos, this playbook is going to provide specific steps you can take to break right through them by harnessing the latest GenAI and LLM advancements — or Agentic AI.

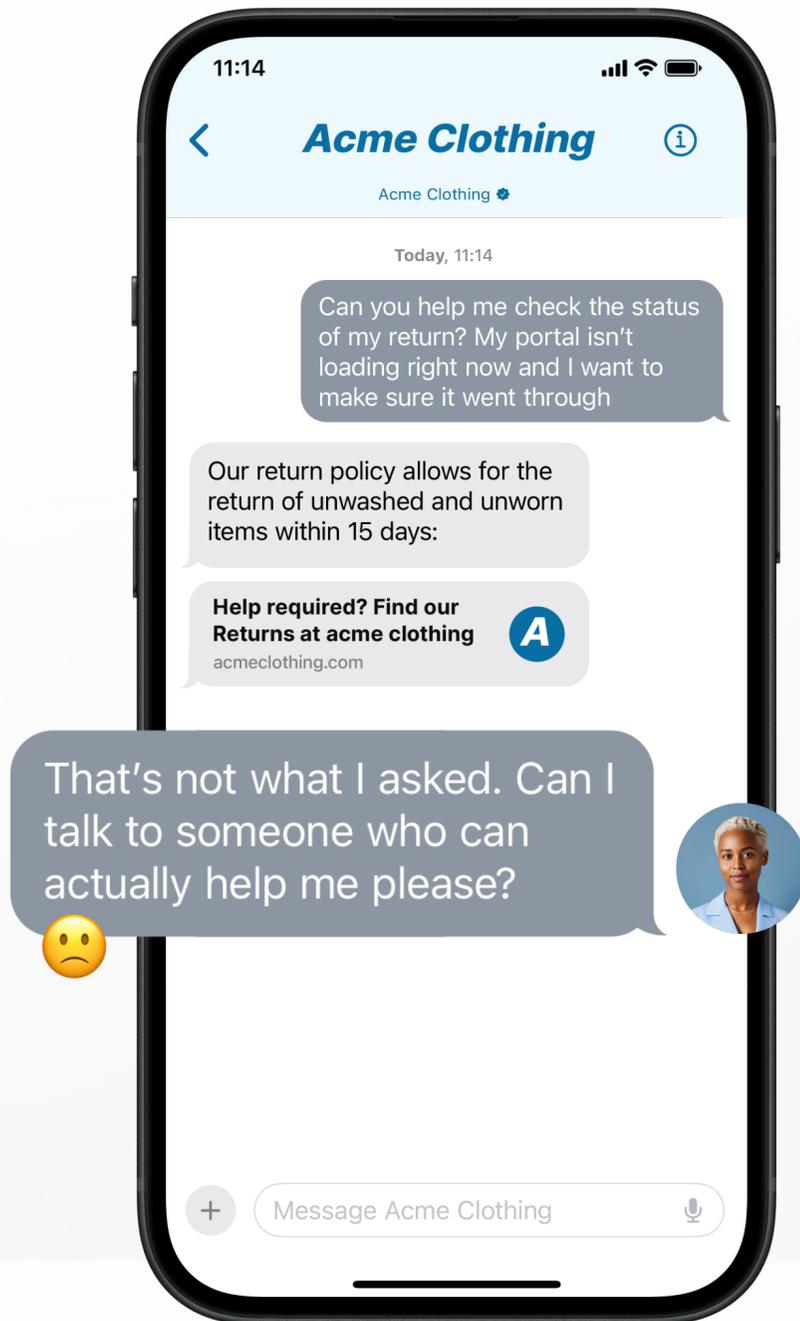
What Is Agentic AI?

Agentic AI is a type of AI designed to exhibit autonomous reasoning, goal-directed behavior, and a sense of self or agency, rather than simply following pre-programmed instructions or reacting to external stimuli. Agentic AI systems may interact with humans in a way that is similar to human-human interaction, such as through natural language processing or other forms of communication.



Silo #1: CX Systems

The Customer Experience



How This Hurts Your...

Customers	Agents	Business
Customers enter the conversation expecting personalized assistance. Receiving the same general information already available via helpdesk articles adds little value and leaves them disappointed and frustrated.	Having to answer every basic personal question puts unnecessary pressure on human agents and eventually burns them out. It also takes their time away from more strategic, high-value work they would rather be doing.	Unlike AI agents, human agents can only manage a few interactions at once before reaching capacity. Companies with siloed CX systems lose money either by hiring more human agents or through employee and customer churn.

Break Down Silos or Burn Out Agents

Studies show that contact center representatives are generally the most stressed of any company employees, with 53% reporting feeling burnt out.



Silo #1: CX Systems

The Underlying Issue

From CRM to marketing automation platforms to help desk software, customer-facing teams use a number of technologies to manage client engagements and information. Today, most of these tools can pass information back and forth to help humans avoid these issues and provide exceptional customer experiences.

However, many AI for CX tools remain completely siloed from the rest of the technology stack. This renders chatbots unable to provide customers with anything other than general information and basic company policies that can be found on the company's website or knowledge base. All other interactions must be passed to human agents, defeating the purpose of employing AI for CX in the first place.

Steps to Shatter This Silo

1. **Choose an AI for CX vendor that connects with the tools already in your CX stack, like your CRM and order tracking system.** Even if they provide robust out-of-the-box integrations, vendors should still offer the customizations you need to ensure your AI agent fits seamlessly into your existing ecosystem and has access to the same information sources as your human agents.
2. **Make sure these integrations are bi-directional,** or that the AI agent can also pass any actions taken, newly collected data, or updated customer information back to the appropriate system(s). This helps prevent the creation of any new silos.
3. **Bake these integrations into the business logic and conversational architecture that guides your AI agents' interactions.** This gives them the power to automatically inform customer engagements with additional, personal attributes accessed from other CX systems, such as a person's customer status or most recent order, without having to explicitly ask, driving efficiencies and accelerating resolutions.

A Silo-Smashing Success Story

A well-known furniture brand sought to differentiate itself through exceptional customer experience, but its team still used a chatbot powered by first-generation AI. This added unnecessary friction to the customer journey, which increased escalations and hurt the brand's ability to capitalize on these interactions.

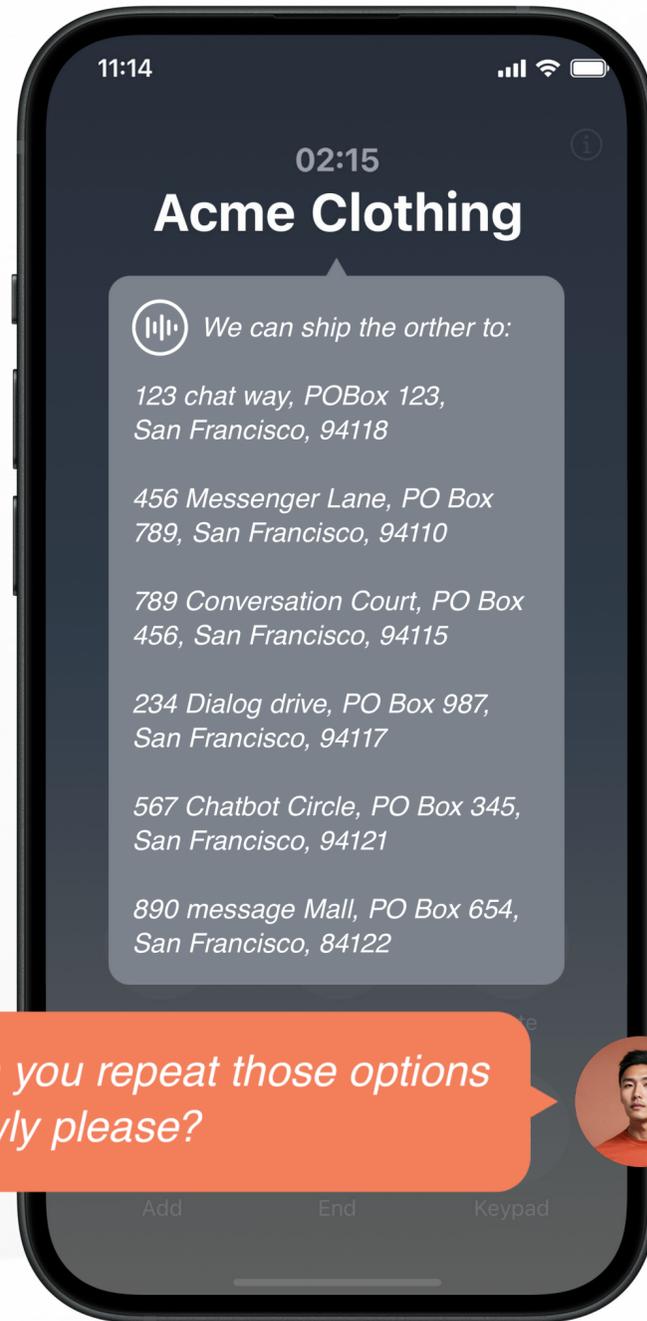
The team partnered with the leading Agentic AI vendor to develop a custom AI agent designed to retrieve accurate information from various systems, including the company's CRM, product catalog, and FAQ knowledge base. Customers now receive more timely, relevant, and personalized responses, resulting in a **33% reduction in escalations to human agents** and substantial operational cost savings.

[Read the Full Success Story](#)



Silo #2: Communication Channels

The Customer Experience



How This Hurts Your...

Customers

Modern consumers expect easy, seamless user experiences. With so many communication channels now available, being unable to choose and move between them depending on their needs is seen as an unacceptable inconvenience.

Agents

Escalations increase as customers attempt to circumvent less than ideal self-service channels and have their issues solved more quickly by humans. Human agents often take the brunt of these harried customers' frustrations.

Business

The inability to provide customers with seamless journeys across the latest channels reflects poorly on a brand's image and perception. The best customers and employees will be lost to more cutting-edge competitors with more convenient experiences.

Time to Change the Channel

Just over **70% of customers** prefer to interact with companies over multiple channels, depending on the context.



Silo #2: Communication Channels

The Underlying Issue

Most companies have focused on keeping up with on-going channel proliferation and having a presence across as many consumer touch points as possible. But offering a multi-channel experience is no longer enough. Customers now want the ability to use multiple channels at once, sometimes simultaneously, and move seamlessly across them depending on their needs.

However, offering these multimodal and omnichannel experiences is made difficult by AI for CX solutions that either fail to provide equal support across [voice, messaging, and email](#), or require CX leaders to create a separate bot for each channel. They also lack the technology and agentic AI sophistication necessary to automatically tailor the experience or route customers to the ideal channel based on the context of the conversation.

Steps to Shatter This Silo

1. **Determine the most common reasons why customers reach out to your business**, and the ideal channel(s) for each of these scenarios. Remember that while it's ideal to meet customers wherever they are, not offering a channel that either does not work for your business or that your AI for CX vendor is unable to adequately support is better than offering a sub-par experience.
2. **Document the information needed to accurately identify these use cases**, What are the specific conversational and contextual clues that a customer wants to return a product, for example? Use this as the baseline for the business logic necessary to route customers to the appropriate channels.
3. **List the specific information needed to resolve these issues, such as your return policy and order number**. Ensure the AI agents for the corresponding channels you identified in step one can access the appropriate knowledge bases and systems where this information lives.
4. **Think through how to reuse and re-purpose the work you did in steps two and three across other channels**. For example, did you create an order lookup flow for WhatsApp that could also be used on SMS? Should all payment inquiries be routed to webchat? This saves time internally, and creates more cohesive experiences for customers.

A Silo-Smashing Success Story

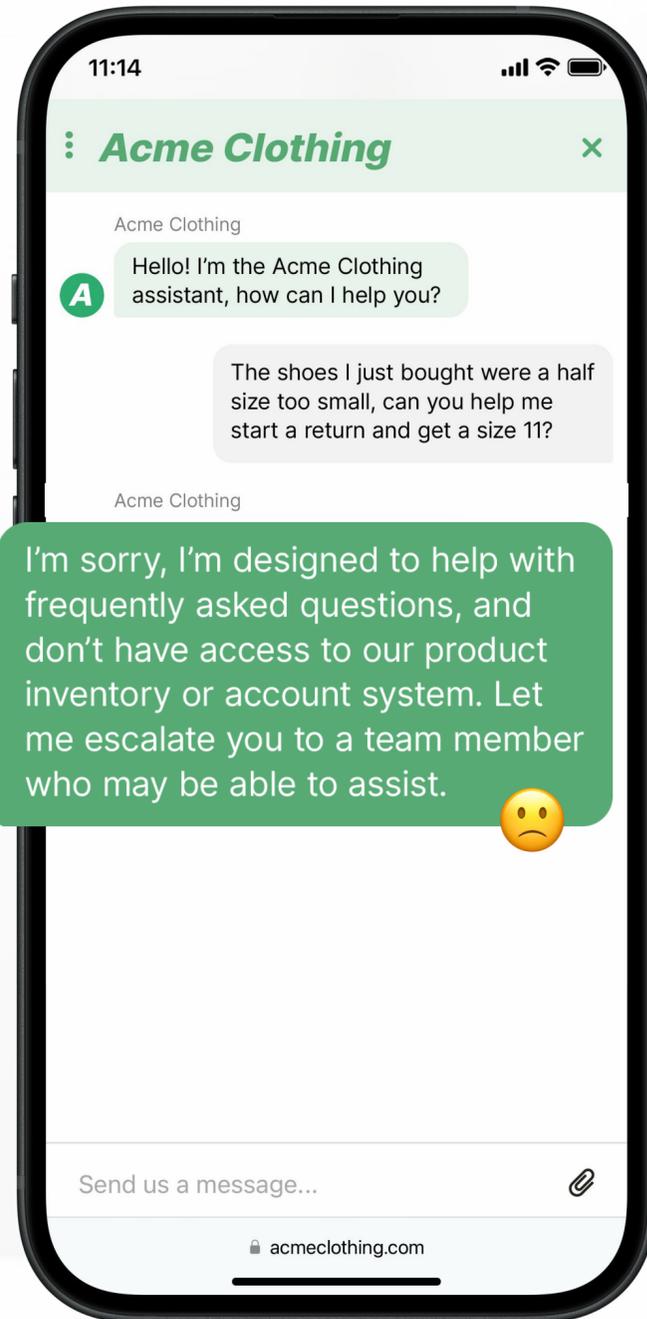
A leading US-based airline saw a large percentage of its customers call in to reschedule their flights versus using other channels. While cancelling their current flight was fairly straightforward, the company's existing IVR system made it cumbersome to select a new one. Customers had to navigate through multiple menus and listen to long lists of flight options, often multiple times.

The airline decided to shift to a next-generation Agentic AI solution that enabled them to easily build and manage AI agents across channels using a single platform. Their new Voice AI Agent can now automatically understand when a customer is trying to reschedule a flight, and offer them the ability to review their options and select a new flight via text. This multimodal approach provides customers with a much more seamless experience.

[Learn More About Voice AI](#)



The Customer Experience



How This Hurts Your...

Customers	Agents	Business
Not being recognized and having to repeat themselves across the pre- and post-purchase process is not only an inconvenient and inconsistent experience for customers, but also makes them feel like their business isn't valued or appreciated.	Entering customer conversations unaware of what has happened on the pre- or post-sales side can make human agents feel anxious and disconnected, making it difficult for them to do their jobs well and drive KPIs like CSAT or up-sells	It's well known that losing a current customer is often more expensive than acquiring a brand new one. The inability to properly bridge pre- and post-sales engagements and improve these transitions means missing out on both new and repeat business

The Great Departmental Divide

Nearly **80% of customers** expect consistent interactions across departments, but 55% say it usually feels like they are not communicating with the same company



Silo #3: Pre- and Post-Sales

The Underlying Issue

It's uncommon for a single AI for CX solution to fully support both the sales and services side of the CX coin. For example, while most AI agents are built to make sense of knowledge bases and help center documentation, they either can't ingest or struggle to effectively display a product catalog.

The ability to automatically recognize a customer or predict

their intent via CRM integration or webpage context is also critical to offering personalized, proactive interactions and effectively routing folks to the appropriate human agents when necessary. Without a single view of how customers are moving through their journeys, companies are unable to measure and improve the impact of pre- and post-sales interactions on specific CX outcomes.

Steps to Shatter This Silo

1. **Choose an agentic AI solution that offers robust functionality for both sales and services in a single platform.** One of the easiest ways to tell whether a tool is designed to support both sides of the CX house is the integrations it provides. If it can't fully access and use data across your order tracking system and catalog management software, either pre- or post-sales engagements will suffer.
2. **CRM is usually the heart and soul of any CX organization.** Ensure your AI agent can bi-directionally connect with this tool, and then determine what specific information is necessary to create the pre- and post-sales experiences you desire. For instance, perhaps you'd like to proactively offer a special coupon to all returning customers.
3. **Map which pages of your website are most visited by new or returning customers, and the questions they're most likely to ask on these pages.** This will allow you to proactively offer more relevant and timely chat menus and AI agent responses, as well as route customers to the appropriate sales or services representative if the need arises.
4. **Consider your top cross-functional CX KPIs, and identify the series of actions intended to lead to these specific outcomes.** Then, build funnels that span pre- and post-sales engagements to measure and improve how each one impacts your desired results. For example, picture the steps that should ideally occur when an AI agent recommends a product to a customer. A product recommendation funnel would enable the team to see what percentage of customers provide the AI agent with their budget and other relevant information, click on the agent's recommendation, and ultimately check out.

A Silo-Smashing Success Story

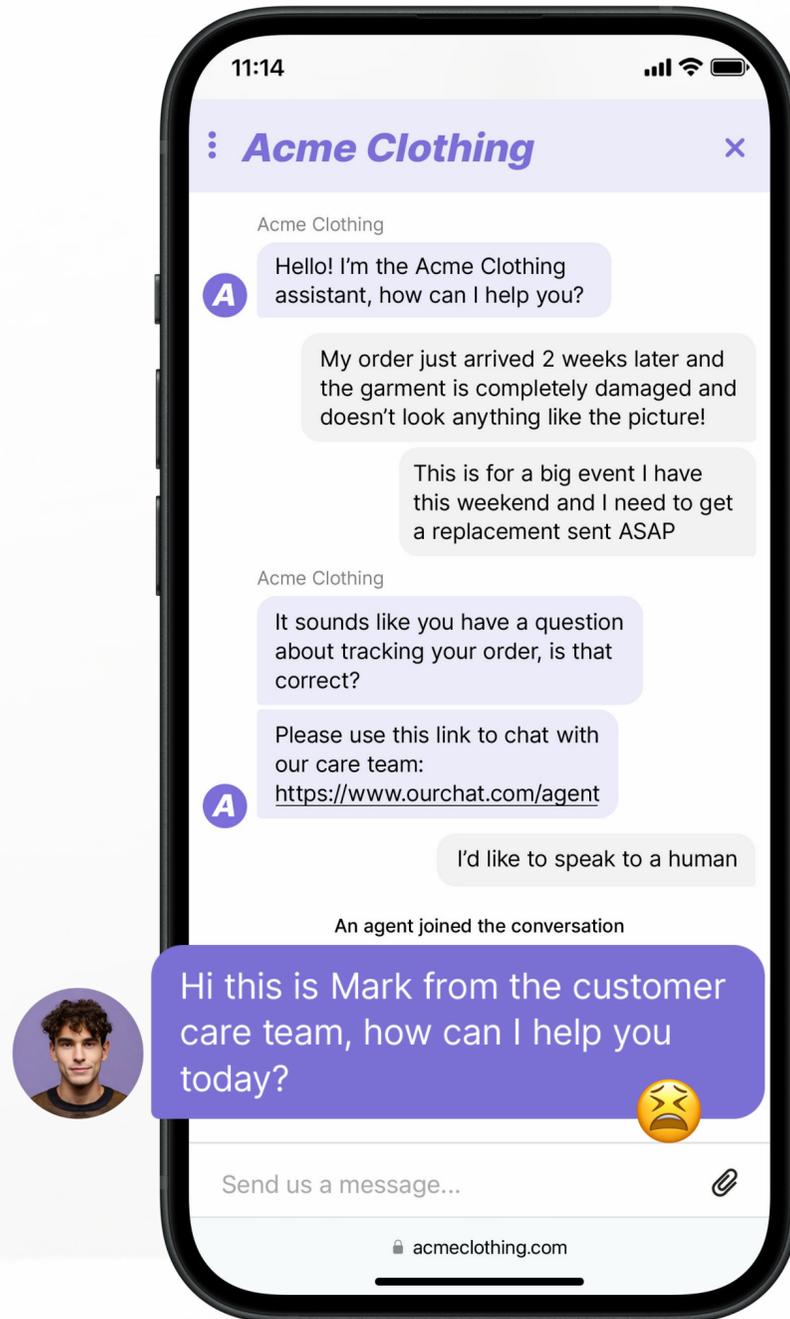
A popular online jeweler has always been known for providing seamless, personalized customer experiences. So much so, connecting online shoppers to Diamond Experts resulted in a 15x improvement in conversion rate. Unfortunately, their existing chatbot struggled to transfer shoppers to the appropriate customer care or sales agents, frustrating customers and leaving money on the table.

After switching to a next-generation agentic AI vendor, the jeweler's AI agents can now identify, separate, and route sales opportunities versus service inquiries — and manage both with the appropriate next action. This has not only resulted in 70% growth in sales interactions with a Diamond Expert, but also a 35% increase in successful transactions.

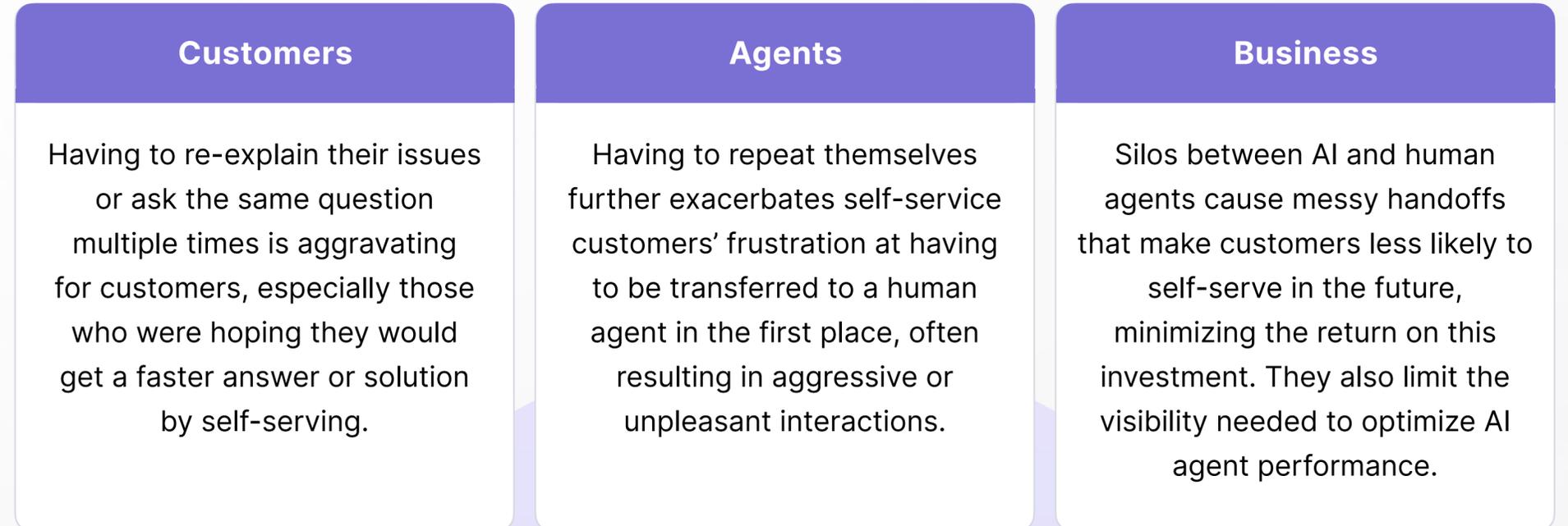
[Read the Full Success Story](#)



The Customer Experience



How This Hurts Your...



Low Effort, High Performance

[A recent study](#) found that "low effort" customer service transitions between self-service and assisted channels drastically improve CX outcomes, including CSAT, positive word of mouth, and retention.



Silo #4: Human and AI Agents

The Underlying Issue

Poor handoffs often occur because most AI for CX vendors do not offer a complete CX solution for both AI and human agents. Instead, they provide either a standalone chatbot platform with minimal capabilities for live agents, or a human-first contact center with limited, first-generation chatbot functionality.

Escalating a conversation to a human representative usually involves switching systems and redirecting customers to an entirely new experience, losing most, if not all, context along the way. This also makes it much harder to get a full picture of when and why these handoffs are occurring, so companies can eliminate knowledge gaps, improve the self-serve experience, and minimize future escalations.

Steps to Shatter This Silo

1. **Give human and AI agents access to the same knowledge and databases, so they're not giving customers conflicting answers.** Don't worry if your knowledge lives in disparate systems or isn't perfectly formatted or organized. Tools exist that can quickly transform this information and make it usable for AI agents, so there's no need to reinvent the wheel.
2. **Ensure your human agents receive the full context of every escalated conversation.** Ideally, this includes an AI-generated summary of the engagement, any data points retrieved from other systems, plus a transcript of the entire interaction. This allows them to get up to speed quickly and dig deeper as necessary — without asking the customer to repeat themselves.
3. **Choose an AI for CX solution that prioritizes and powers both human and AI agent interactions in a single console.** Not only does this streamline handoffs for customers on the front end and human agents on the back end, but it also makes it much easier to see where customers are giving up on self-service or escalating issues to human agents. These actionable insights enable CX leaders to pinpoint and document “tribal knowledge” that will improve AI agent effectiveness and the self-service experience.

A Silo-Smashing Success Story

"BRINKS has been a happy Quiq customer since November 2017. We started by implementing two-way, asynchronous messaging for sales and customer support, which reduced our call volume YoY, including 30% in just the past 3 years. In that same timeframe, we had increased our NPS scores by a staggering 90+ points.

We recently added generative AI using Quiq's AI Studio, which allowed us to leverage our own LLM, which certainly made IT happy. Our customers like having the ability for digital support via our help centers and links to live chat agent support. All of these improvements have led to a CSAT score improvement of 18% in just the past 12 months."

Brian Lunseth, Director of Digital CX & Development at Brinks Home

[Learn More About Seamless AI-to-Human Agent Handoffs](#)



So Long, Silos!

“Everybody is very interested in leveraging AI, but when data is not centralized or unified it will pose a big challenge for most organizations,” says award-winning customer experience expert and founder of Experience Investigators, Jeannie Walters, in [a recent article](#).

She continues, “In CX our whole goal is to have this consistent, seamless journey for the customer, and the only way we can do that is if the right data appears in the right moment, to the right person or right tool, or the right process.”

As the leader in customer-centric agentic AI for CX, Quiq does this by creating best-in-class solutions that enable seamless customer journeys across channels, systems, and agents.

To learn more about how we do it and why today’s leading CX teams choose Quiq to help shatter siloes across their organizations, visit quiq.com.

