

the AI manager's templates for reporting on AI agent performance

How to track, measure, and report on the AI agent to showcase its impact on business objectives.



what's inside?



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Quick review...

You're about to dive into *company engagement*—which is one dimension of AI customer service.

To get an overview of all the dimensions that make up an ACX program and with actionable steps on leveling up the maturity of each one, check out *the 5 dimensions of AI customer service*.

[get it here](#)



the 5
dimensions
of AI
customer
service



the vital role of reporting in the success of AI customer service

At the heart of extraordinary customer experiences lies ACX—AI Customer Experience—a strategy that centers around using AI agents to elevate how businesses connect with their customers and transform the role of customer service.

But here's the thing, even the most advanced AI solutions won't reach their full potential unless they're supported by one key ingredient: *company engagement*.

Company engagement is the art of *connecting your ACX team's achievements with the goals that matter most to your organization*.

By sharing success stories and performance metrics, you demonstrate how ACX delivers real impact—whether it's happier customers, greater efficiencies, or stronger business outcomes. Without this visibility, ACX risks being undervalued or sidelined.

by regularly measuring, tracking, and reporting on AI agent KPIs, amazing things happen:

01

bigger impact through continuous improvement

Gain clear insights into your automated conversations—pinpointing where your AI agent delivered relevant, accurate, and secure responses, and uncovering opportunities for continuous improvement.

02

ACX earns more investment

Sharing your wins and clearly demonstrating how they ladder up to business goals shows leadership the value of doubling down on ACX, opening the door to bigger budgets and more resources.

03

your career gets a boost

When you make ACX visible, you make yourself visible. Driving success in ACX creates opportunities for growth, leadership, and recognition.



understanding the relationship between automated resolution (AR) and CSAT

An Automated Resolution (AR) is a fully automated conversation between a customer and a business that is relevant, accurate, and safe, and does not involve a human agent. It's the most reliable measure of an AI agent's abilities and the most useful metric to understand how it can improve.

CSAT continues to be an important metric in understanding the overall quality of the customer experience. It's a window into customer sentiment and a great way to keep a pulse on areas you're doing well in, and areas that have room for improvement.



"We use automated resolution rate as a core KPI for our digital support team, and we are reporting it up to our senior leadership because of the efficiencies that we are driving throughout the business."

Allie Hurley
Head of Global Support



Combining AR with CSAT offers a powerful way to *uncover the reasons behind customer sentiment* without having to manually audit conversations.

By analyzing topics across AR and CSAT, you can pinpoint actionable insights and prioritize improvements.

low CSAT, low AR

Customers aren't getting what they need from the AI agent and are dissatisfied as a result.

Key questions to ask:

- Is the AI agent handing off inquiries when it cannot solve them, or is it attempting to respond inaccurately?
- Where can you enhance knowledge, coaching, or guidance?
- Do we need to add new API calls or actions to provide better answers?

Next steps: dive into individual conversations, identify gaps, and prioritize updates to boost both AR and CSAT.

high CSAT, low AR

Customers are happy, but there's untapped potential for automation.

Key questions to evaluate:

- What are your human agents doing in this topic area that the AI agent can't?
- Can you expand the AI agent's capabilities with new knowledge or better access to business systems?

Next steps: audit transcripts with human agents to identify tasks that could be automated, reducing manual effort while maintaining customer satisfaction.

low CSAT, high AR

The AI agent is resolving issues, but customers aren't satisfied with the outcomes.

Key questions to evaluate:

- Is the AI agent providing correct responses that still leave customers unhappy (e.g., denying a refund)?
- Are there areas where the AI could improve the way it delivers responses?

Next steps: monitor this area closely to ensure that dissatisfaction isn't stemming from preventable issues, and refine the AI agent's tone and delivery where needed.

high CSAT, high AR

You're excelling here—customers are satisfied, and the AI agent is resolving inquiries effectively.

Key questions to evaluate:

- What is working well in this area?
- How can you replicate this success across other topic areas?

Next steps: use this as a benchmark for expanding the AI agent's capabilities and scaling its success across the organization.



sample AI agent report



Recipient: ACX Director and ACX team members

Cadence: Weekly

Channel: ACX program status meeting

week-over-week stats

Week	Volume	AR	AR rate	Avg handle time	Surveys collected	CSAT
Feb 10 - Feb 16	28,870	17,322	60%	1m 58s	11,345	51.6%
Feb 3 - Feb 9	29,433	18,873	64%	2m 5s	13,788	53%

Pro tip: [build custom dashboards](#) for your ACX program that focus on the metrics you care most about, making them real-time and publicly available to everyone in your company.

weekly wins

Top 3 contributors to AR	Volume	AR rate	Reasons for success
Inquiries about shipping policy	6,421	95%	Knowledge base content optimized for generative AI
Inquiries about refund eligibility	4,020	92%	New API integration unlocked automation for these inquiries
Inquiries from customers in France	870	92%	Connected France-specific knowledge base

Showcase the top 3 contributors to a high AR rate and insights on the success, such as: a new API integration that expanded the AI agent's skills, improvement after coaching, a well-structured knowledge article, etc.

weekly opportunities

Top 3 unresolved topics	Volume	AR rate	Opportunity
Billing extension requests	11,265	4%	Can drastically improve AR rate by adding AI agent skill
Inquiries about new tax policy	800	3%	Creating a new article can automatically resolve these
Complaints about missing reward points	1,428	2%	Alert Rewards team about potential issue

Showcase the top 3 unresolved topics and strategies to improve them, such as: creating a new knowledge article, coaching the AI agent, integrating additional software that the AI agent can pull data from, etc.

updates

Updates from last week	Impact
<p>Such as:</p> <ul style="list-style-type: none">improvements made to the knowledge base, product, or any other areas of the business that was informed by AI agent dataimprovements made to the AI agent itself—new integrations, training...issues from the previous weeks that have been resolved	<p>Such as:</p> <ul style="list-style-type: none">increased AR ratereduced handle timecross-functional influence (e.g. update to the product roadmap, optimized onboarding, etc...)

Highlighting the impact of the updates further validates the time and effort spent working on them and demonstrates a 1:1 impact.

AI highlights and insights

Highlights and insights
Highlight additional wins and insights surfaced by the AI agent, such as: positive customer reviews, early issue identification, increased refund requests about specific products, anecdotes of very successful generations, the AI agent handling an unexpected conversation volume spike, etc...

Think of these as opportunities to build trust in the AI agent and showcase the potential impact that the ACX program can have on the company's growth.

barriers to automation opportunities

Opportunity	Resource needed
Billing extension requests currently take up too much agent time. Enabling the AI agent to handle these requests will free them up and increase AR rate by 10%, netting an additional \$25,000 in cpc savings.	5 hours of dedicated technical resource to set up API access to the billing system.

AI Managers often face challenges in securing the resources needed for improvements—like tapping into new APIs or expanding the AI agent's skills. Here you can spotlight big opportunities or roadblocks to automation so that the ACX Director can advocate for resources on your behalf.

[link to the fillable Google spreadsheets template](#)



[related reading](#)



- [Understanding your AI agent's dashboard](#)
- [How to get deeper, more integrated data](#)

addressing questions and overcoming misconceptions

There are 2 main focus areas that ACX Directors scrutinize when AI Managers present this report. Here's how you can address them.

01

CSAT

If there's been a dip, come prepared with root causes and actionable insights. Highlight whether the issue stems from unmet customer expectations, product gaps, or other factors, and outline potential next steps to resolve them. Refer back to p.8 for ideas on how to dig into the data.

02

Missed AR goals

Use this opportunity to spotlight any possible roadblocks. Whether it's the need for new APIs, additional coaching, or better knowledge content, clearly explain the barriers and their impact. This not only demonstrates your understanding of the challenges but also positions your manager to advocate for the resources you need to succeed.



sample evangelization message

Recipient: Entire Customer Service team

Cadence: Monthly

Channel: Internal team chat channel

Hi Team, I'm excited to share some insights on Brandy (our AI agent) for February 2025.

Automated Resolutions:

- January: 25,000
- February: 27,000
- Month-over-month: 8% increase
- Customers were asking a question that we didn't have knowledge content for so Brandy wasn't able to answer them. We created the necessary content which unlocked more automated resolutions.

Since AR is the north star metric for ACX, share how it's tracking. Keeping the team in the loop reinforces its importance and highlights progress.

Pro tip: use the AI agent's name to make it feel like part of the team.

Big wins:

- Thank you to the Education team who worked quickly to address the content gap that Brandy highlighted! As a result of this collaboration, we're now seeing increased AR.
- Our latest feature release had an unexpected bug that was affecting users on Android. We were able to catch this early thanks to insights from Brandy's dashboard and notified the Product team, who patched it immediately.

Celebrate impressive successes to validate the importance of ACX and build excitement for the program's ongoing impact. Tag collaborators in your messages to callout their contributions to the month's success.

Examples of wins: improvement in CSAT, big drivers of AR, positive customer reviews, early issue identification, anecdotes of very successful generations, the AI agent handling an unexpected conversation volume spike, or cross-functional collaborations and their impact on AR.

Focus for March:

- Giving Brandy access to our Shopify account so tha it can automatically pull up and edit order details for customers. We project this will result in an additional 1000 AR per month.

Mention the efforts that are being prioritized to continue improving performance. Not only does this keep the team in the loop, it also fosters a collaborative environment and inspires new ideas for team members to get involved.

If you have any questions about any of the above (or AI agents in general), please don't hesitate to ask. We're also always open to collaborating, so if you have ideas for improvement, send them my way. Let's continue building on this momentum and achieve even greater success!

Position yourself as the AI expert and invite collaboration opportunities.



addressing questions and overcoming misconceptions

When communicating with the broad Customer Service team, there are a couple of questions or misconceptions that may arise.

Here's how you can overcome them:

01

Compliance and sensitive inquiries

If questions arise about how the AI agent handles compliance or sensitive topics, share how it's been coached to manage these scenarios. Explain the safeguards in place to ensure accuracy, security, and a positive customer experience. This helps reinforce confidence in the AI agent's capabilities.

02

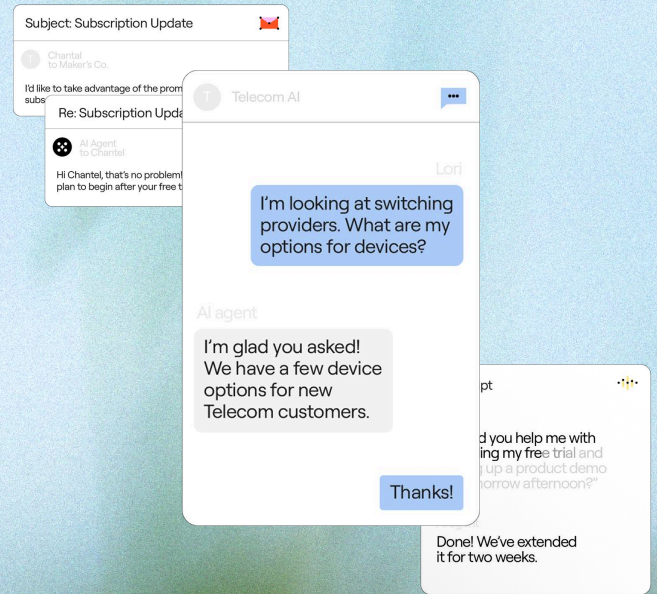
Addressing mishaps

If there have been any missteps, acknowledge them openly. Provide a clear explanation of why they occurred, what's being done to address the issue, and how you're working to prevent similar occurrences in the future. Transparency here is key to maintaining trust and demonstrating continuous improvement.



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ada