

Leveraging automation to reimagine the service desk and provide a premier customer experience.



Use case
Service

Industry
Business Services

Integrations
N/A

Key metric
↑ 8+ min of agent time savings with automated call summaries
↑ Speeds incident management processes

Yes, it's true: Even businesses dedicated to the digital transformation of hundreds of state and local government agencies and commercial organizations can end up with a legacy problem. In a world where customers expect service continuity 24/7 and experiences that are fast, efficient, and solve issues the first time, you don't want to be an organization "stuck in a rut" with a service desk solution. Yet that's exactly where global business and technical professional services firm CAI found ourselves in recent years.

If we were going to consider transitioning from a legacy solution that was increasingly unable to keep up with our scale or the demands of the modern service desk, it was important to put into practice the tools and techniques that have helped define CAI as one of the larger systems

integrator organizations over the past decades. "Our customers demand best-in-class solutions," says Chief Technology Officer Matthew Peters. CAI's solutions are somewhat bespoke because "it's about meeting the customer where they are and getting them to where they want to be."

It is a philosophy our privately held company internalized as we navigated the evolution of our service desk, leaning harder on new technologies to push the limits of what's possible. We expected to draw from our well of service experiences in managed technical services, staff augmentation, our pioneering support of neurodiversity in the workplace—CAI is one of the largest employers of neurodivergent individuals in North America—and everything in between to navigate the lift of such a transition.



"For the longest time, customer satisfaction was the gold standard that we had to adhere to. And now, even our conversations with our legacy customers have really changed. The customer experience has to be better."

— MATTHEW PETERS, CHIEF TECHNOLOGY OFFICER, CAI

The role of automation in a modern service desk.

CAI's service desk has 300 agents who support more than 500,000 end users globally across North and South America, Asia Pacific, and EMEA. "It is a remarkably efficient machine," says the Executive Director, Service Desk, Thomas Grosso. Peters adds that CAI beats every one of Gartner's averages for service desk performance. As it became more evident that our legacy service desk solution was anchoring down our ability to meet modernized demands, we considered our options.

To Grosso, those demands include meeting customers where they are. "That doesn't always mean picking up the phone and calling somebody," he says. It could consist of web forms and chatbots, applying automation that leads to autonomous resolution in a matter of seconds. "If we can resolve an issue before a user even hits an agent, that's a win-win," Grosso says.

Automation is a cornerstone of everything CAI does. It drives efficiency, mirroring another of the service desk's demands. "It's leveraging these tools to do more with less and spend time where it matters," Grosso says.

CAI's legacy solution had increasingly limited functionality, and there wasn't enough research and development (R&D) investment in the platform, meaning we lacked a roadmap for innovation. The business continuity and disaster recovery plans were also outdated, presenting a risk. Peters adds that the legacy system didn't offer much in terms of application programming interfaces (APIs), even though CAI invested heavily in automation tools.

Customers today expect constant continuity of service. With our old system, that wasn't possible. Service was available "as soon as someone could get to it, and that's just not good enough anymore," Peters says. He and Grosso agreed it was time to leave their old solution behind.

Delivering functionality and support customers expect.

CAI benchmarks much of our performance against Gartner—a firm that delivers actionable, objective insight to drive smarter decisions and stronger performance for a variety of organizations—so that's where we turned to find the leading options on the market. The final decision came down to Talkdesk CX Cloud and Verizon Virtual Contact Center powered by NICE inContact. CAI also evaluated Genesys but dismissed it as the product demonstrations did not address our needs and the vendor lagged in responsiveness. After a financial, technical, and functionality comparison, CAI ultimately chose Talkdesk for four key reasons:

1. **Out-of-the-box flexibility and functionality.** Talkdesk is a low-code, almost no-code solution.
2. **Heavy R&D investment.** In contrast to our previous solution, Grosso says we knew we were "constantly going to get the freshest of the platform at least twice a year, if not more." Given CAI's drive to stay ahead of the game, Grosso calls Talkdesk's investment in R&D "a decision-maker."
3. **High-quality support.** Grosso and Peters were confident Talkdesk would quickly resolve any issues, and they were both impressed by how well the Talkdesk approach to artificial intelligence (AI) meshed with CAI's mindset. "We feel that with this partnership, we are able to accomplish what we envision as the future of the service desk space," Grosso says.
4. **Top-notch security.** A final security evaluation showed that Talkdesk would meet the heightened requirements of CAI's public sector clients. That practically made the business case for Peters.

CAI used [Talkdesk Professional Services](#) for the rollout, which was partly a question of opportunity cost. Our team had other projects on the go and didn't have infinite capacity. When considering the 24/7 operations of a service desk serving hundreds of thousands of end users, we figured it would be best to acquire some flex capacity through professional services.

Unfortunately, CAI would learn the value of those services four weeks sooner than we expected due to a total collapse on our legacy vendor side—which happened on a Friday leading into a long holiday weekend. “We were operating on our legacy system, fielding calls, and the next thing you know, calls stop routing,” Grosso remembers. “We’re dialing into our IVR (interactive voice response) system, and it says, ‘This service is not available.’”

CAI had two options: attempt to restore services with our legacy platform or migrate to Talkdesk early. We chose the latter.

Working with Talkdesk, CAI got three-quarters of our operations up and running in under three hours, with the remainder going live over the weekend. “I give Talkdesk a lot of credit for it,” Peters says. Some vendors would be unavailable to customers on such short notice or over a holiday. CAI would never do that, and neither did Talkdesk. “They were in it with us all weekend long,” Peters says.



“We work with a lot of different vendors. Talkdesk was among the most, if not the most, cooperative and collegial professional services and delivery experiences that I’ve had. They are a really good team to work with.”

— MATTHEW PETERS, CHIEF TECHNOLOGY OFFICER, CAI

Innovation that improves the end-user experience.

When CAI chose Talkdesk, we went all in. We harnessed “everything we felt we needed to hit the ground running and maximize ROI as quickly as possible,” Grosso explains, including [Talkdesk Workforce Management™](#), [Customer Experience Analytics](#), and [Talkdesk Copilot™](#). We now have a lot more at our fingertips than before, which has required adjustments to new AI-powered capabilities like scheduling staffing according to volume forecasts.

From a workforce management perspective, CAI leverages intelligent automation for forecasting, staffing, and scheduling, enabling more accurate and timely decision making. With Customer Experience Analytics, AI can flag customer intent in all customer communication. This capability allows Grosso’s team to set up alerts to notify them if intents come up repeatedly in a short

time period—suggesting a pervasive issue like an outage. This feature highlights major issues and speeds up the incident management process. “It has enabled us to be more proactive versus reactive, which is a big deal for our clients since major incidents typically have a productivity and financial impact,” Grosso says.

Our team also leverages Talkdesk Copilot, an AI-powered assistant that proactively delivers contextual recommendations, next best actions, and automated assistance to the agent during live calls. Talkdesk Copilot then automatically creates a summary of the call using GPT, streamlining after-call work. An agent might otherwise spend eight minutes summarizing the conversation themselves, so saving that time on each call delivers impactful operational gains.

The modern service desk allows users to transition seamlessly from one channel to another. Agents appreciate Talkdesk Copilot, especially as the platform's omnichannel capability provides an interaction summary when users transition from chat to call. Similarly, Talkdesk's plug-and-play dashboards allow CAI to share information with clients through an easy sign-in. CAI customers also like the added functionality that Talkdesk continues to deliver. "Our customer service experience is not staying stagnant, and they know that future changes are going to keep coming," Grosso says.

Metrics like first-level resolution, abandon rate, and average speed to answer are now merely table stakes. "You have to hit your performance metrics to even come to the table," Grosso says. Instead, he asks a different question of the service desk: "How can we deliver that positive customer

experience that gets them coming back?" CAI measures this through satisfaction surveys, and we are looking at leveraging the after-call survey feature alongside a net promoter score (NPS) methodology.

To Peters and Grosso, the litmus test for successful automation is its net positive impact on the end user's experience. The most innovative aspect of CAI's contact center is the automation-first mindset. "Talkdesk enables us to do what we do at a greater scale, more effectively, giving us customer experience solutions that have a direct impact," Grosso says. "There's probably still more in the platform that we just haven't gotten to yet," he adds, "which is one of the things I love about Talkdesk."



"It's not about metrics anymore. Those are table stakes in today's world. Now we're all focused on the customer experience and that end-to-end journey."

— **THOMAS GROSSO**, EXECUTIVE DIRECTOR,
SERVICE DESK, CAI



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