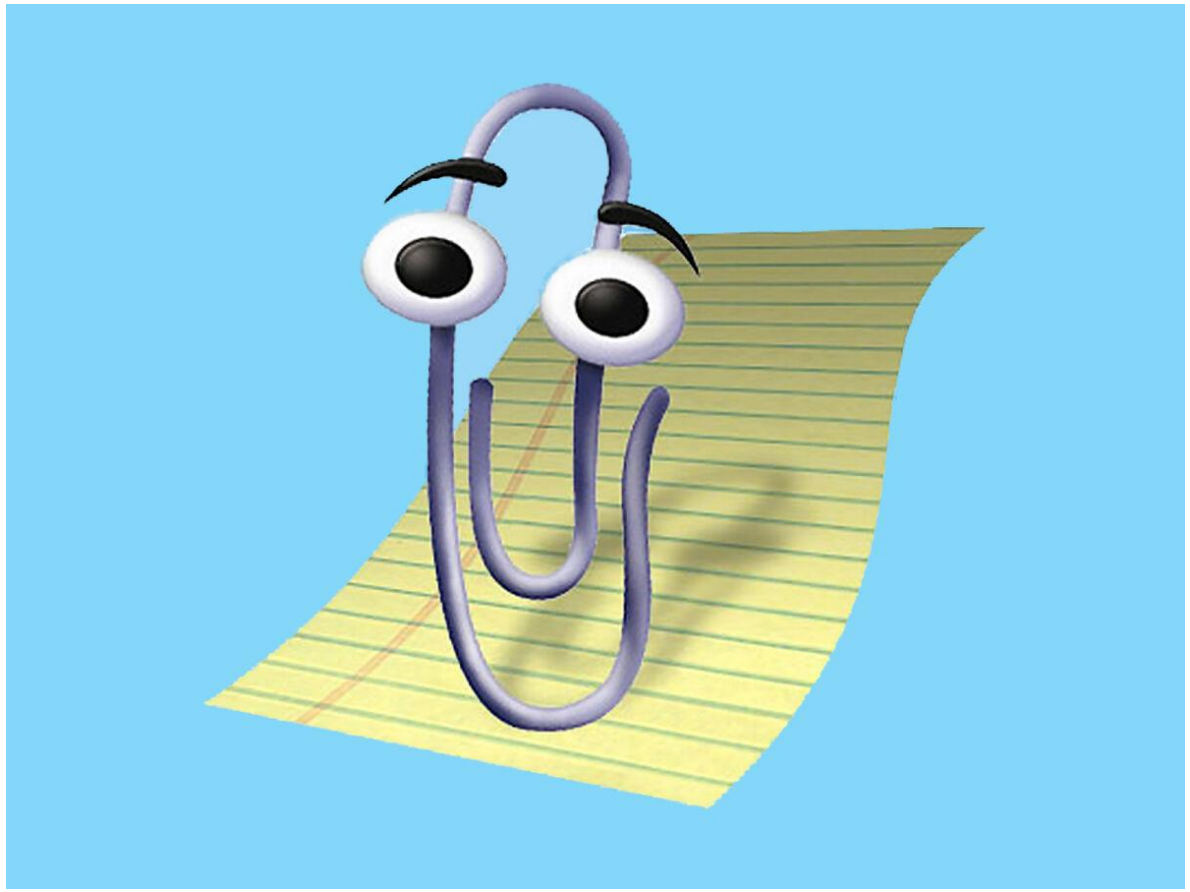
Implementing automation using AI Agent and AI Assistant Actions

Shaun Robinson
Solutions Engineer, Webex CX

BRKCCT-2557



Useful, domain knowledge, but couldn’t do much.

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Virtual assistants are a likely win for a number of industries

Generative AI Use-Case Comparison for Banking

Source: Gartner

Note: AML = anti-money-laundering; KYC = know your customer; KYB = know your business

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[Generative AI Use-Case Comparison for Banking.pdf]

GenAI Use Case Assessment for Human and Social Services

Source: Gartner

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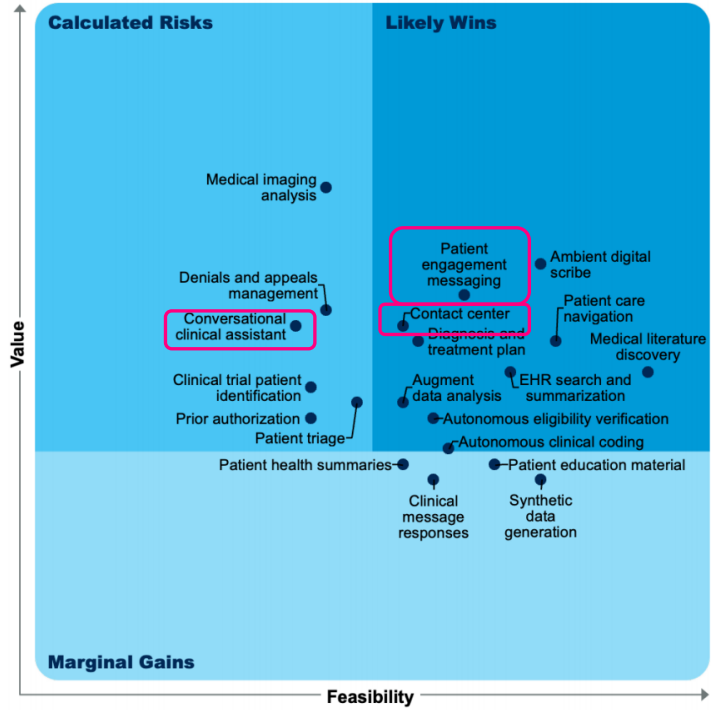
[Generative AI Use-Case Comparison for Human and Social Services.pdf]

GenAI Use-Case Assessment for Healthcare Providers



Source: Gartner

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[Generative AI Use-Case Assessment for Healthcare Providers.pdf]

Gartner

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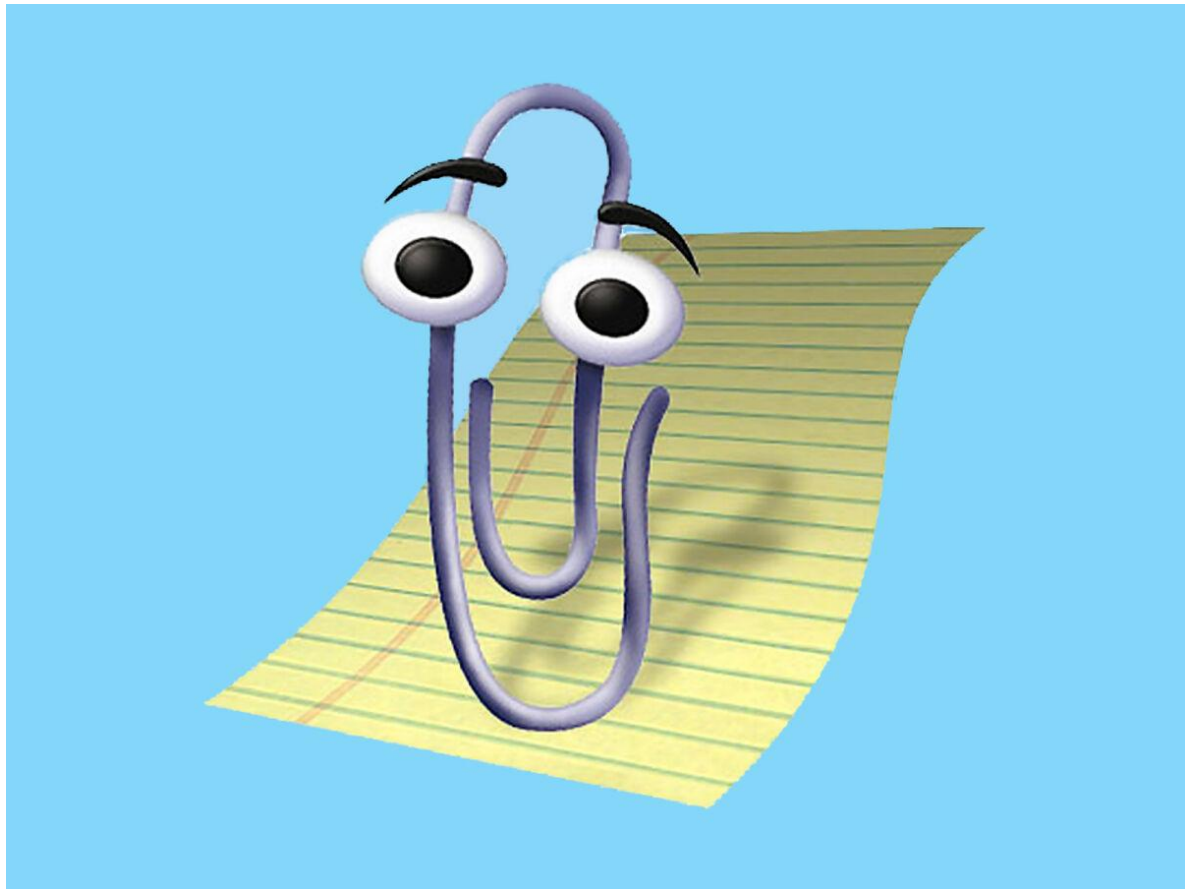

Useful, domain knowledge, but couldn’t do much.

Home Assistant(s)

Domain knowledge, context aware, able to influence the world around it

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Rolling out automation can make your life a lot easier

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It can also be expensive, time consuming, and even burn your house down

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And this can go badly in CX operations too.

Cost overruns, science projects…

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And this can go badly in CX operations too.

Cost overruns, science projects... and trying to do too much in one project

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Today we'll look at great starting points for automation, and help you make your first automation a success.

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Today's Agenda

01 Why AI Agents?

02 What can our Agents do?

03 AI Agent Studio

04 Building Actions in Connect

05 Adding the Action to an AI Agent

06 Handling escalation to Humans with AI Assistant

07 Making the AI Assistant work for you

08 Best practices & next steps

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Cisco Webex App

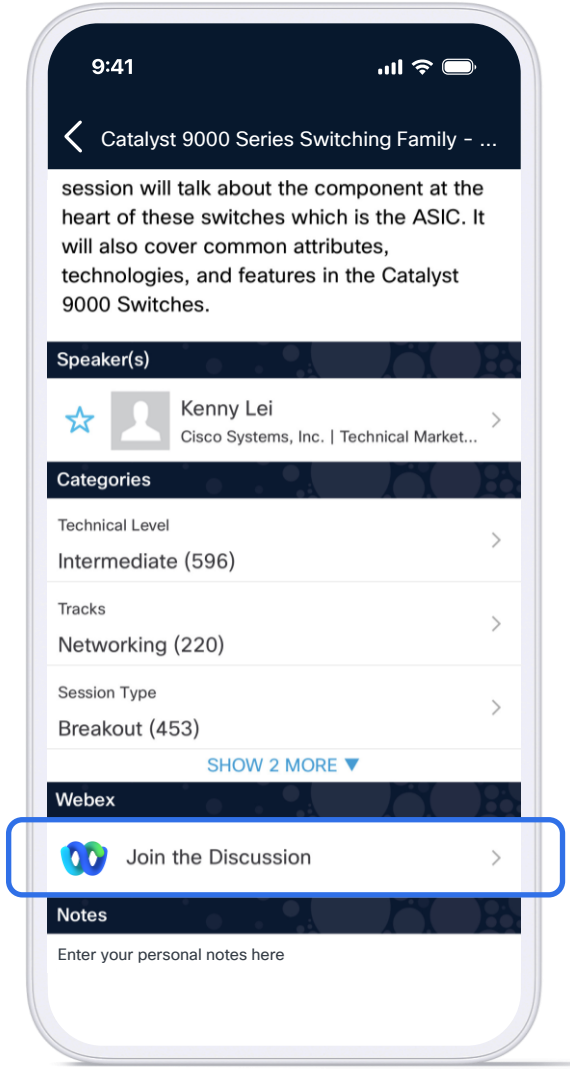
Questions?

Use Cisco Webex App to chat
with the speaker after the session

How

1. Find this session in the Cisco Live Mobile App
2. Click “Join the Discussion”
3. Install the Webex App or go directly to the Webex space
4. Enter messages/questions in the Webex space

Webex spaces will be moderated by the speaker until 14 November 2025.



https://ciscolive.ciscoevents.com/
ciscolivebot/**#BRKCCT-2557**

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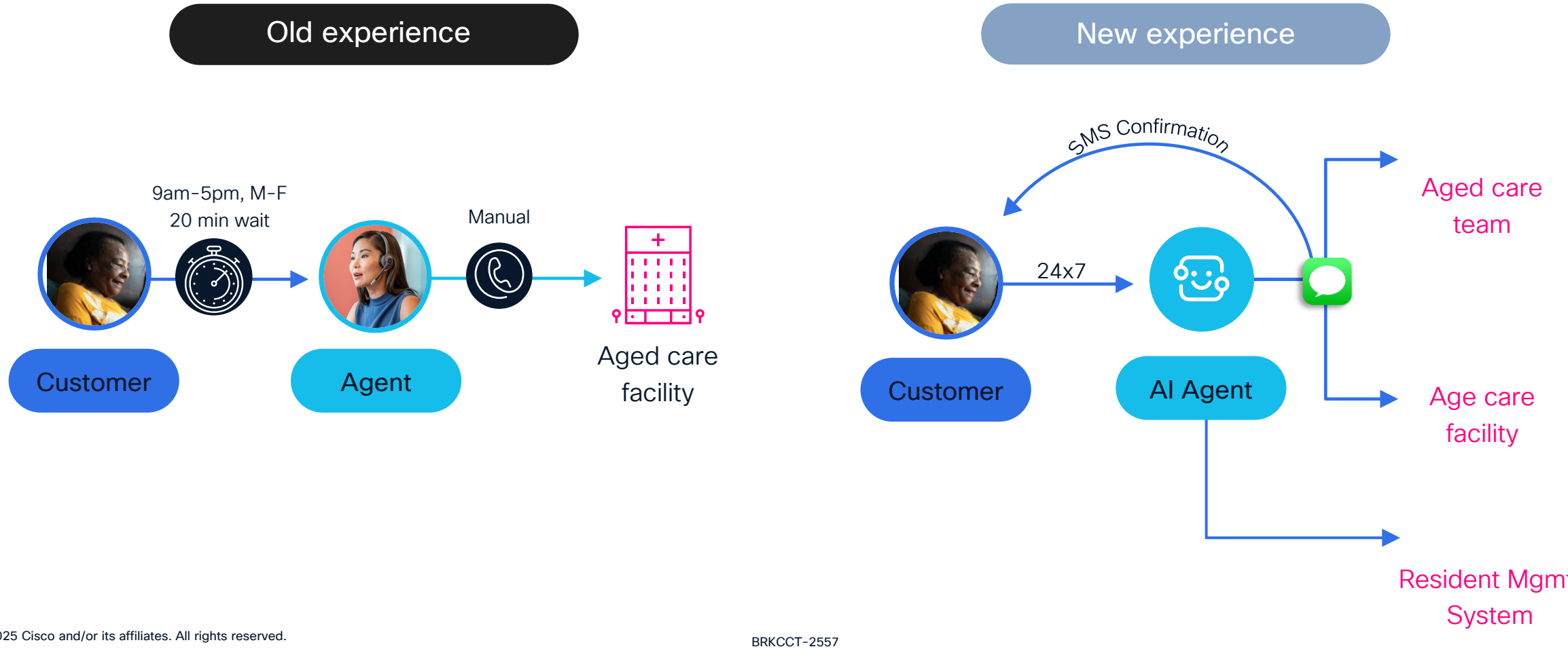
Why AI Agents?

Old vs new experience



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AI is embedded across everything we do

Developers & ecosystem

AI assistant for developers | BYO virtual agent

Proactive journeys
Campaign management
AI agent linking

Webex Connect

AI agents
Omnichannel, multimodal, & multilingual
Scripted & autonomous modes
Execute actions & fulfill in

Webex Connect

Human agents
Summarization | Responses / answers
Wellbeing | Performance management

Webex Contact Center
Contact Center Enterprise

Customer experience foundation

Cloud platform | Insights & analytics

Webex platform

Noise removal | Prediction | Assurance | Translation | Summarisation

Cisco security

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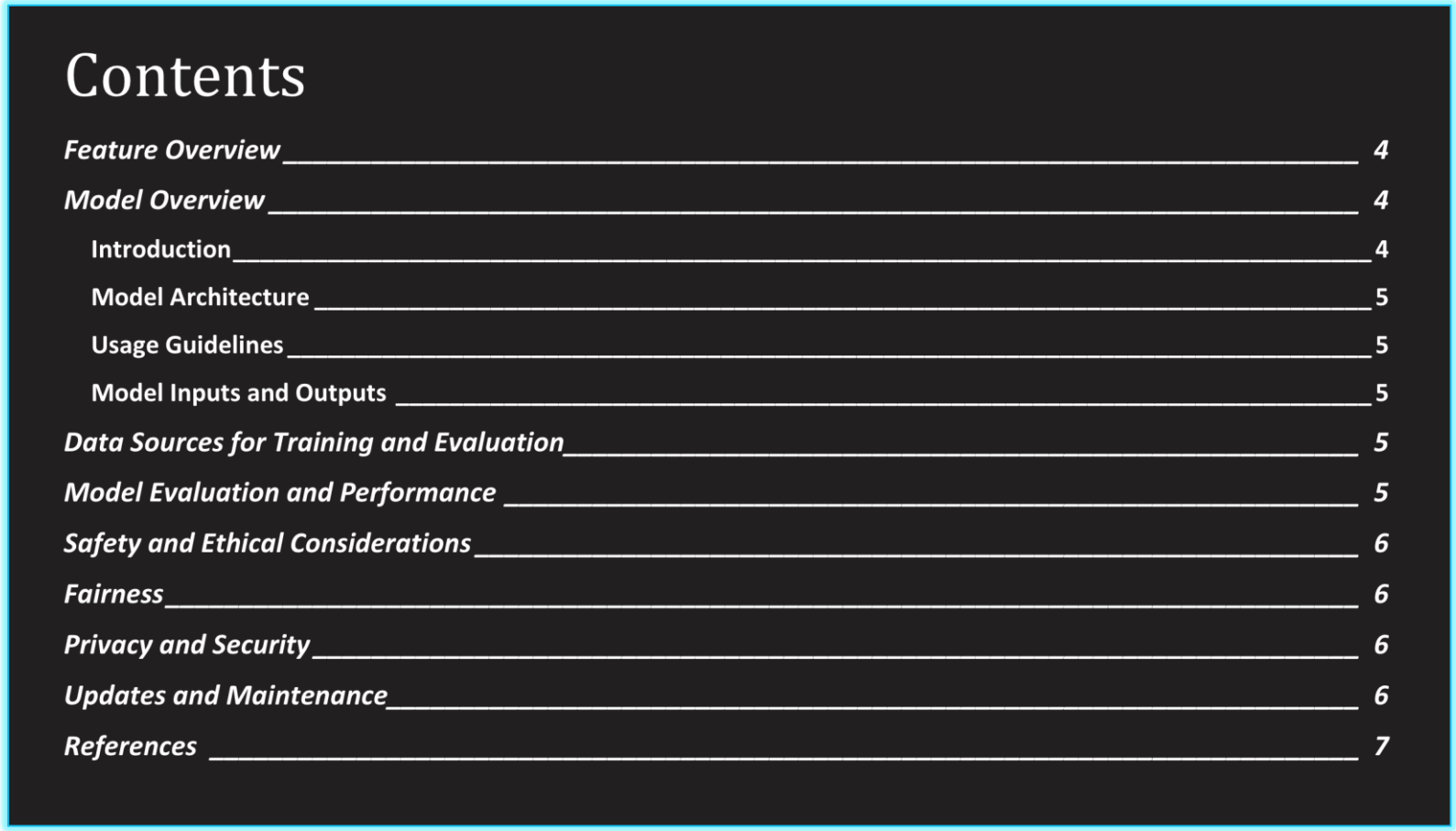
AI Transparency notes – available on TrustPortal

- Model Details
- Data Sources
- Safety & Security
- Privacy



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Model Overview 4
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Usage Guidelines 5
Model Inputs and Outputs 5
Data Sources for Training and Evaluation 5
Model Evaluation and Performance 5
Safety and Ethical Considerations 6
Fairness 6
Privacy and Security 6
Updates and Maintenance 6
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https://trustportal.cisco.com/c/r/ctp/home.html

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AI Agent and AI Assistant

Seamless Experience

Customers receive immediate, accurate resolutions

Knowledge Access

AI navigates knowledge sources to find answers

System Integration

AI performs actions across connected platforms

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Delivering a frictionless customer journey

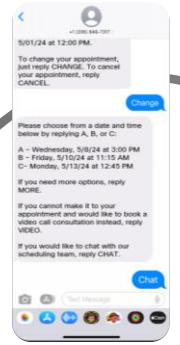
Anticipate needs

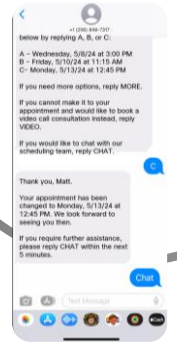
24/7 Front door

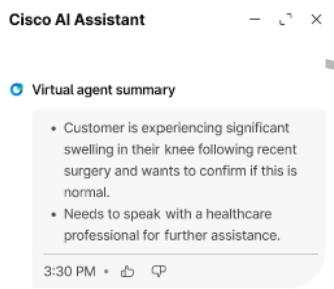
Fulfil requests automatically

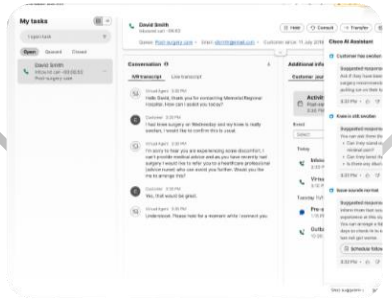
Seamless handover

Empathetic humans









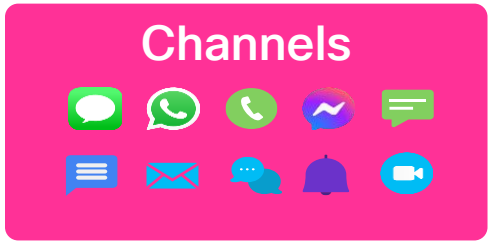
Proactive notification

Self-service

Interaction with Business Systems

Handover to human agent

Agent engagement



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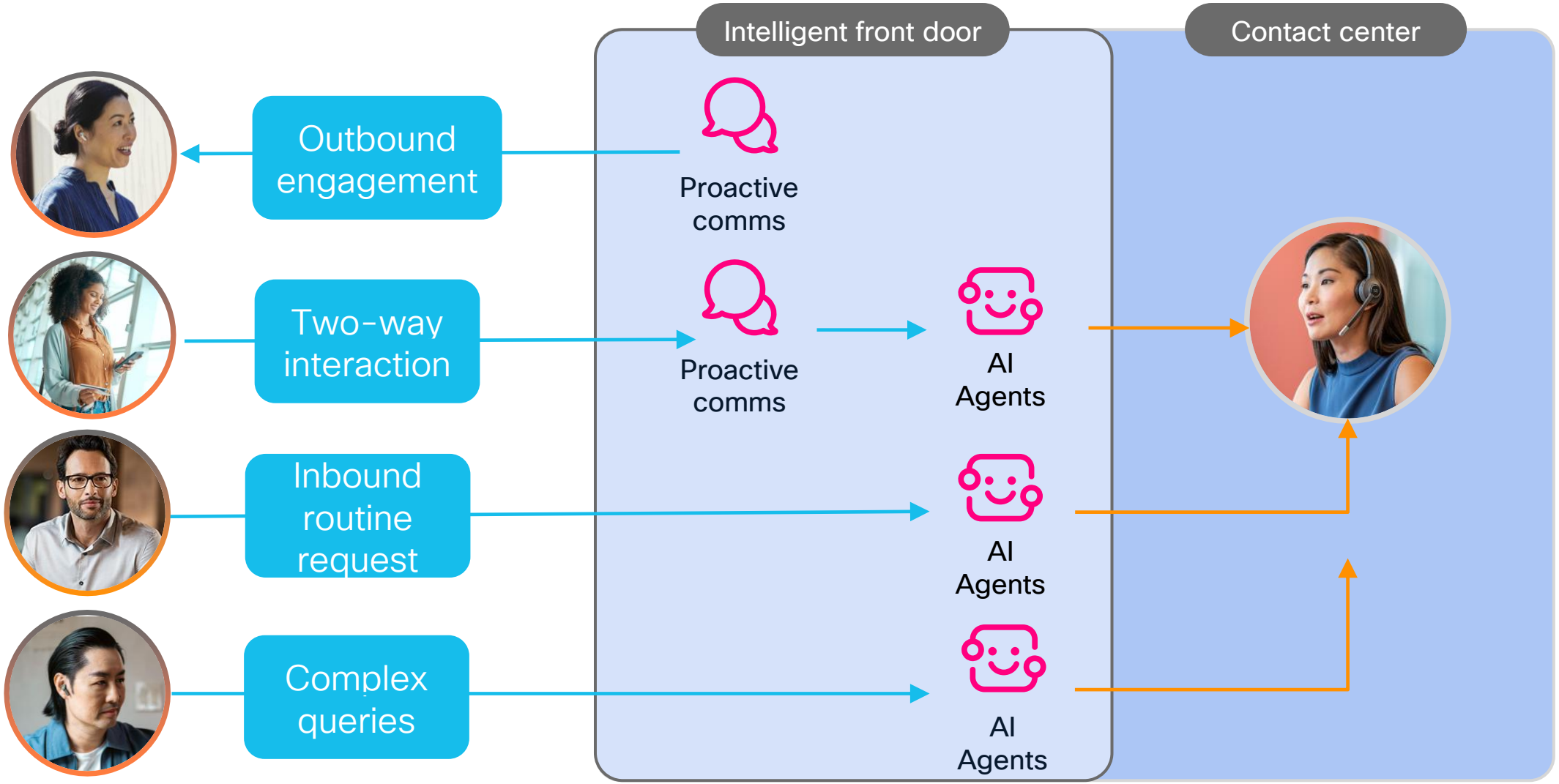
Examine the best starting point for automation



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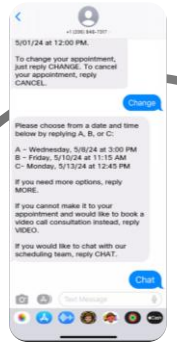
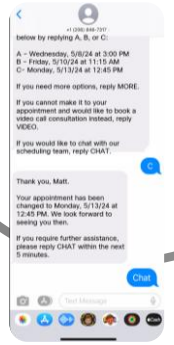
Let’s focus on what we can solve in 90 minutes

Anticipate needs



Proactive notification

24/7 Front door



Self-service

Fulfil requests automatically

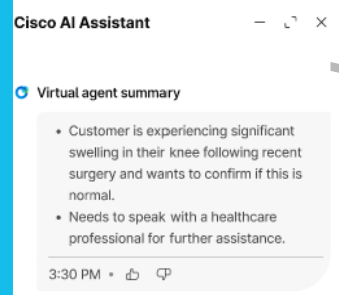
Business Systems

servicenow aws zendesk Epic freshdesk ORACLE ZOHO SAP salesforce

Interaction with Business Systems

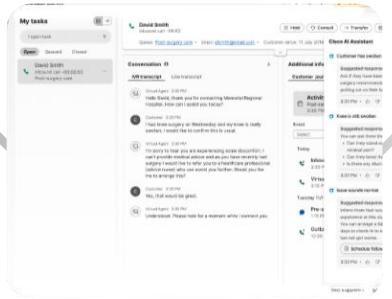
Channels

Seamless handover



Handover to human agent

Empathetic humans



Agent engagement

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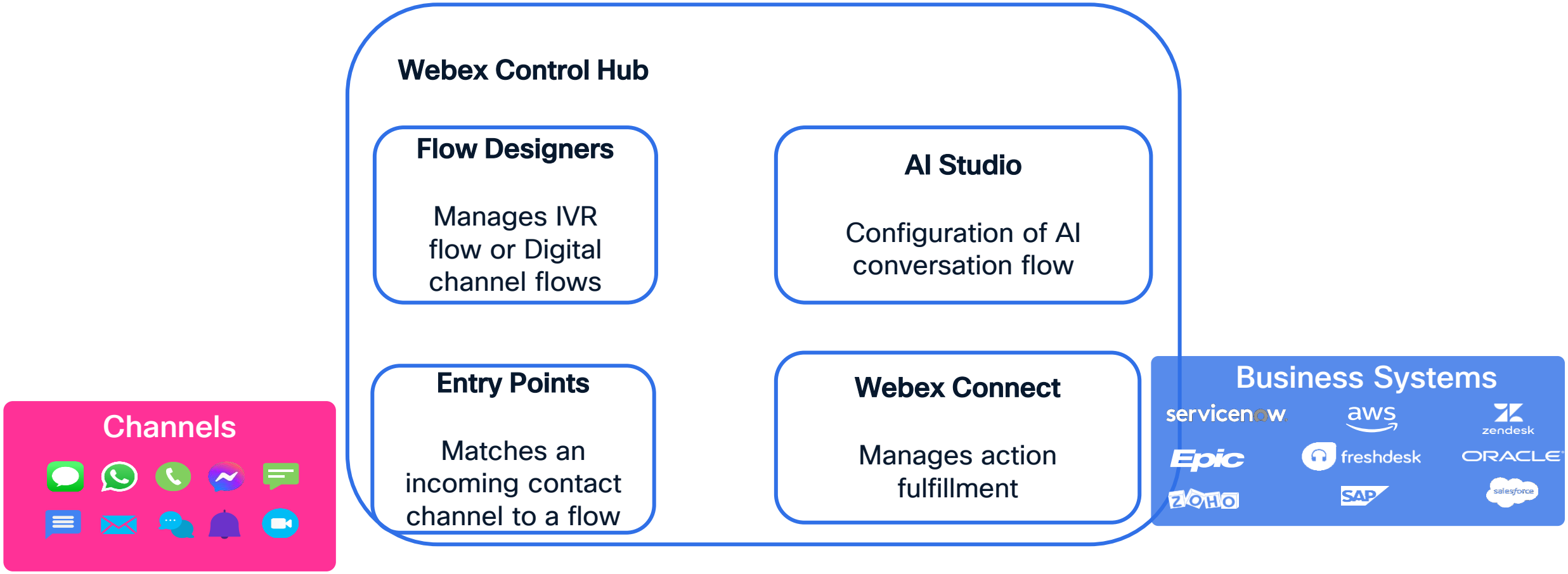
The touchpoints along our AI journey



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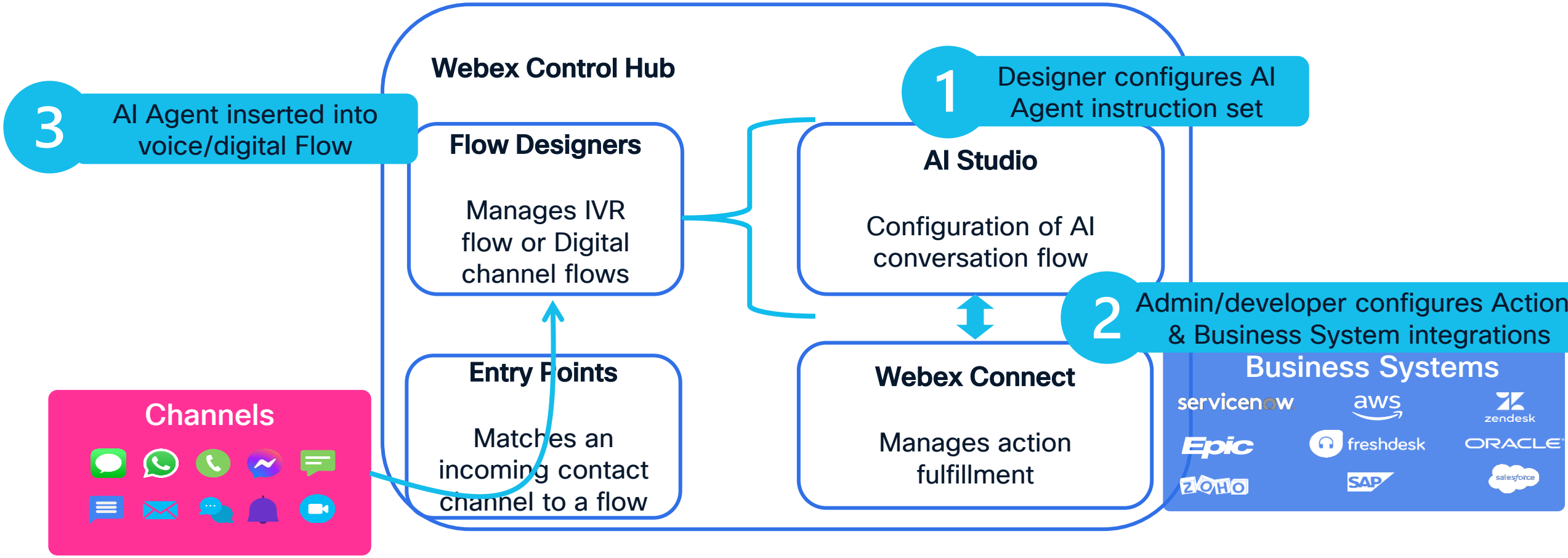
The touchpoints along our AI journey



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How can we make our agents useful?

Integrating AI Agent into Business Systems

To allow AI Agents to autonomously service customer requests, they require access to the systems that humans (either agents or customers) would interface with.

CRM Systems

Integrate with platforms like Salesforce to access customer records, update cases, and manage relationships in real-time.

ITSM Platforms

Connect to ServiceNow and similar systems to create tickets, track incidents, and manage service requests seamlessly.

Identity Systems

Link with EntraID and authentication platforms to verify users, manage access, and ensure secure interactions.

Custom Systems

Integrate with custom databases and third-party applications directly, or via API-gateway, to retrieve and update critical business data.

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Common Types of AI Agent Actions

Retrieving Information

Access real-time data such as current case status, account balances, order history, or scheduled appointments from connected systems.

Updating Records

Modify system data including adding case notes, updating customer details, or cancelling bookings automatically.

Sending Notifications

Deliver confirmations and alerts via SMS, email, or push notifications for appointments, one-time PINs, authentication requests, or new work items.

Raising requests

Capturing requests for humans to approve or fulfill using traditional processes, for things that require human intervention such as new hardware requests, flight bookings. This also addresses systems that don’t have API connectivity.

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The three steps to an action

Define the input that the AI Agent should collect

- Customer identifier
- Booking time/date
- IT Incident information

Perform the actions

- Get/Set information on an external system
- Send a notification on another channel (e.g. SMS)

Collate the information to return to the agent

- Case information
- Message confirmation
- One-time PIN code

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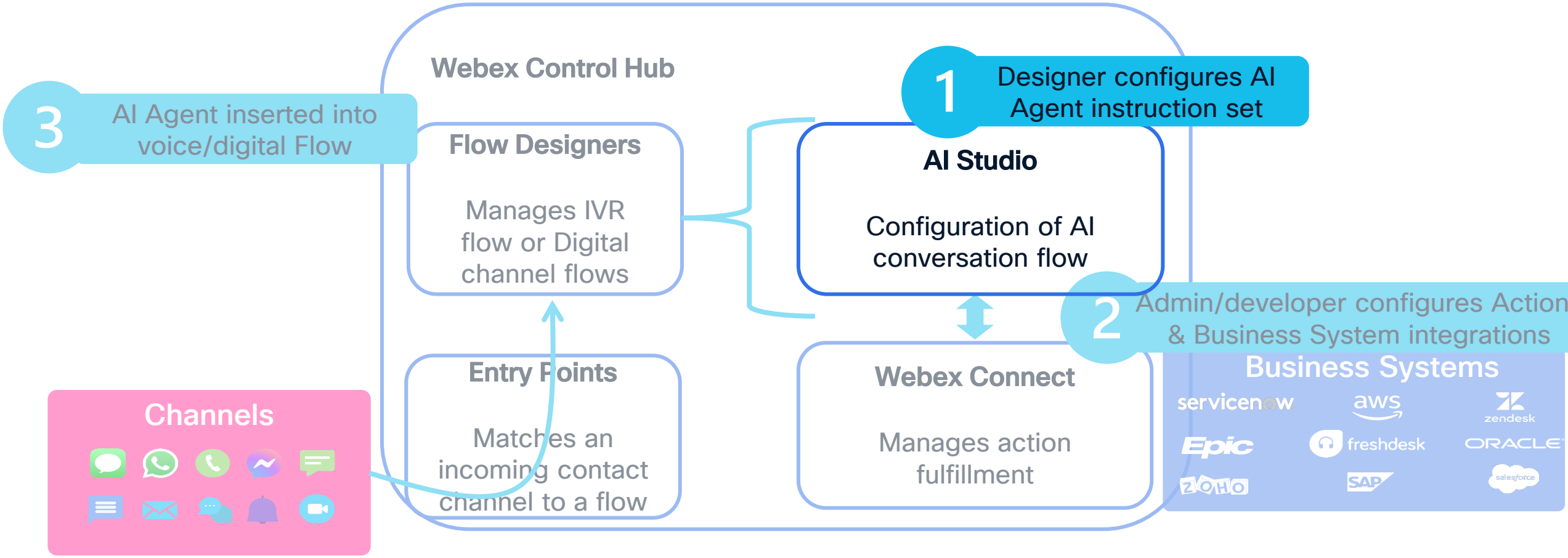
AI Agent Studio



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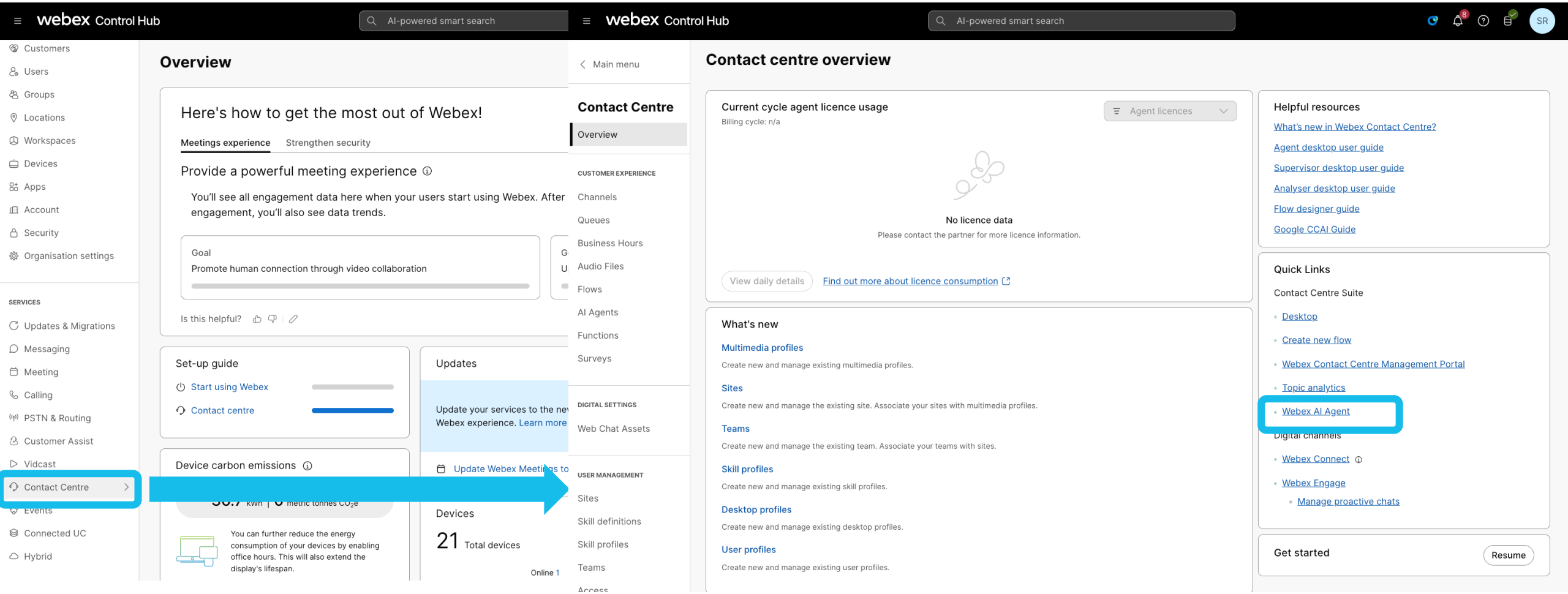
Accessing AI Agent Studio from within Control Hub



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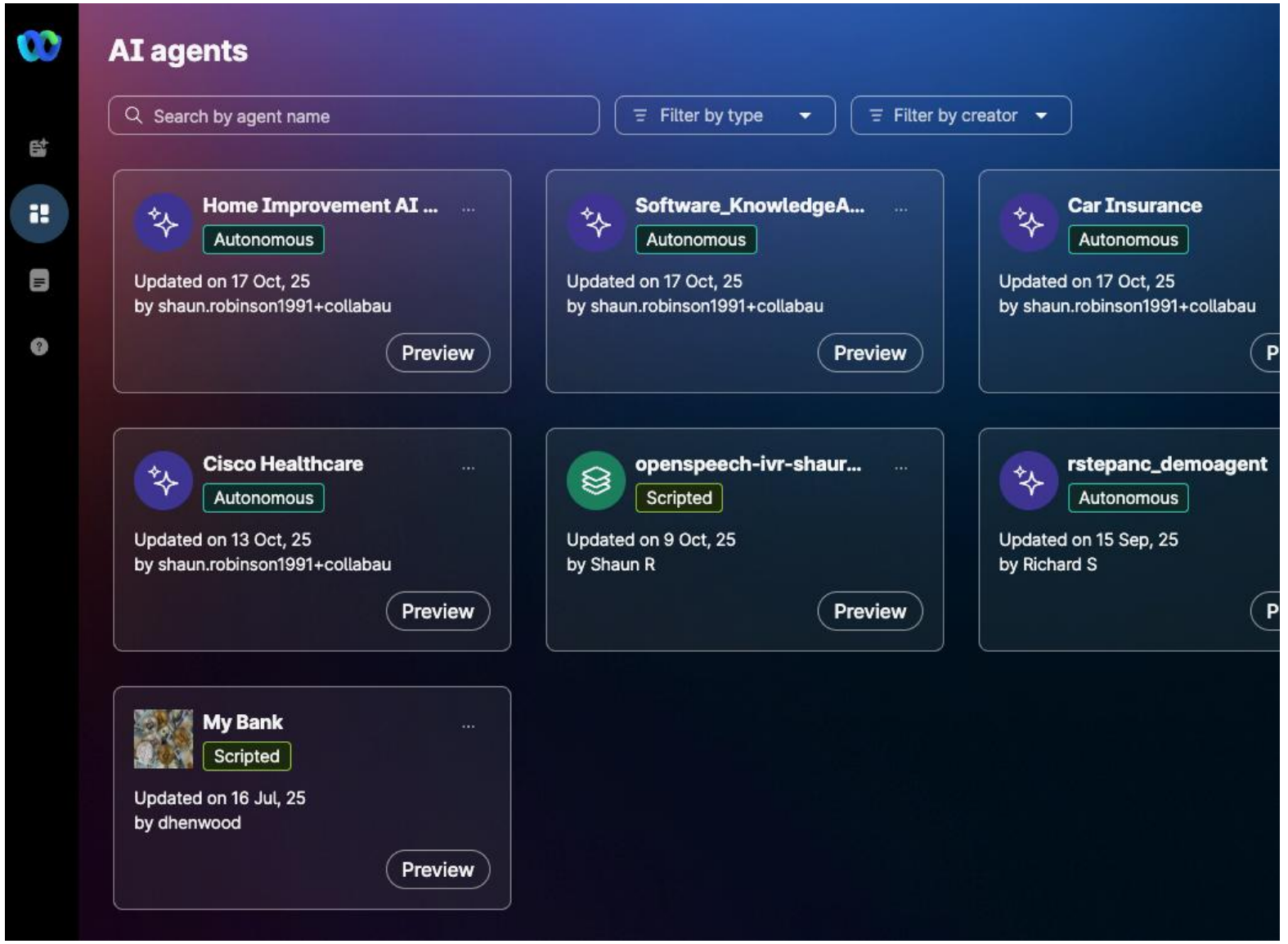
AI Studio

AI Studio is where you configure AI Agents, AI Assistants and their knowledgebases.

This will evolve into managing knowledge connectors, MCP integrations and API integrations in 2026.



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Sample AI Agent configuration

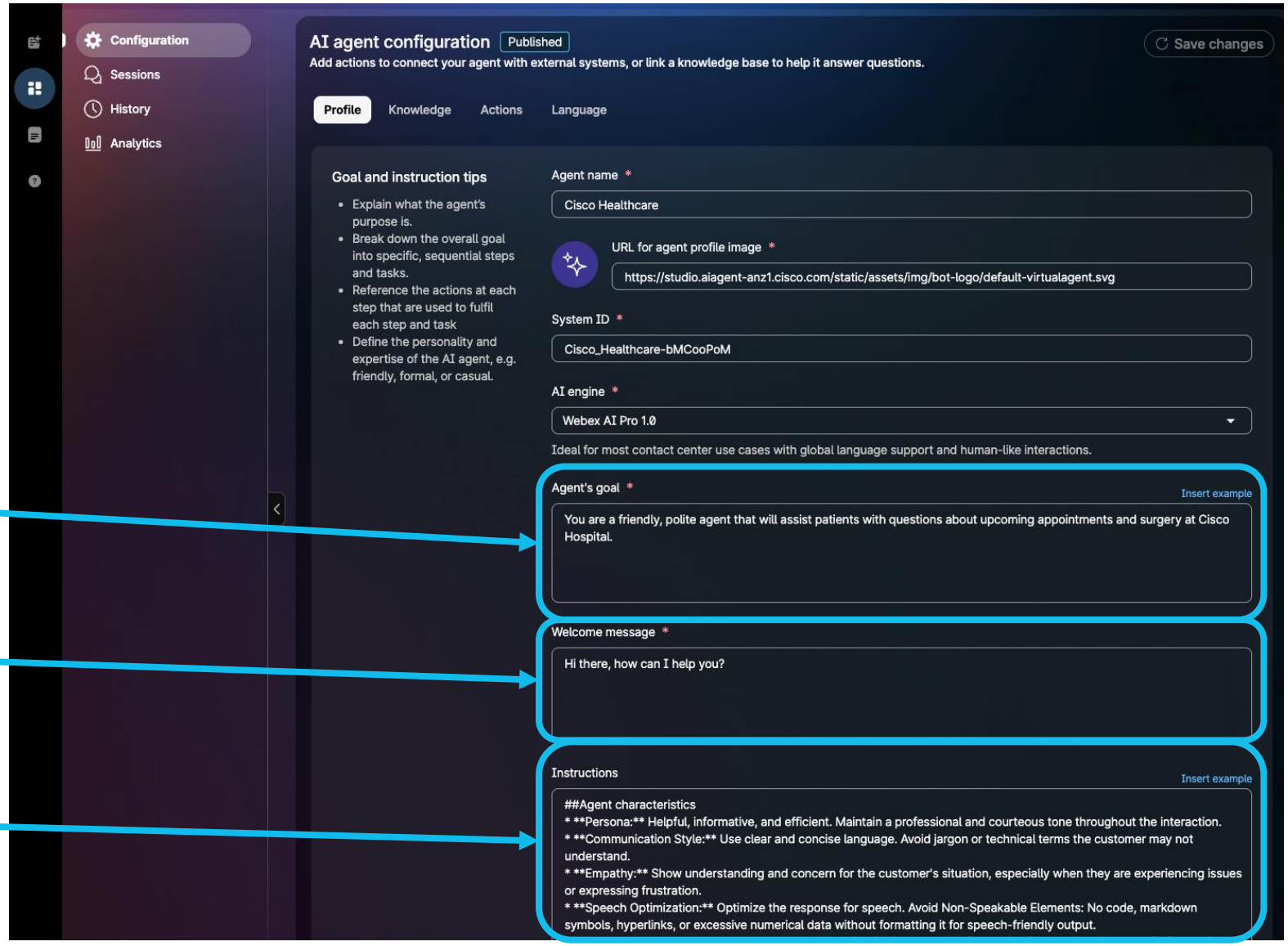
Agent Goal

The resumé or “mission statement” for the Agent.

Welcome message

Instructions

Detailed guide on how to behave



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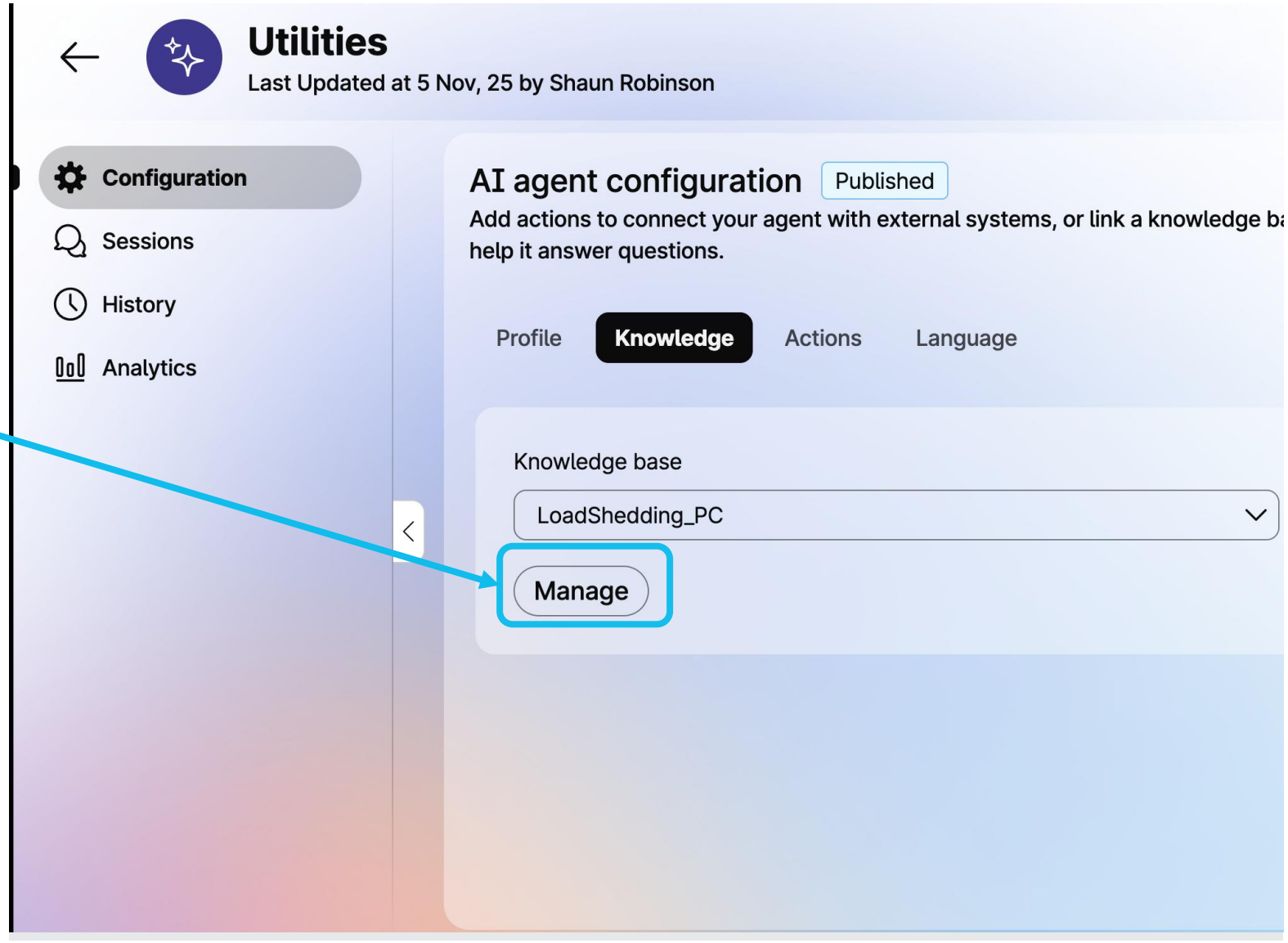
Managing AI Agent Knowledge

Knowledge

Configured documents or articles for knowledgebase

Knowledge base can contain files uploaded, or articles configured in Markdown.

Supported file formats for upload: pdf, docx, txt, xlsx, xls, csv.



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Guidance on the Agent Goal

The resumé of your AI Agent, or the mission statement of your AI Assistant

- “You are a polite, friendly agent that will assist with organising flights and hotels for employees of Acme Inc.”
- “You’re a casual, plain-speaking agent that will help home broadband customers with troubleshooting steps.”

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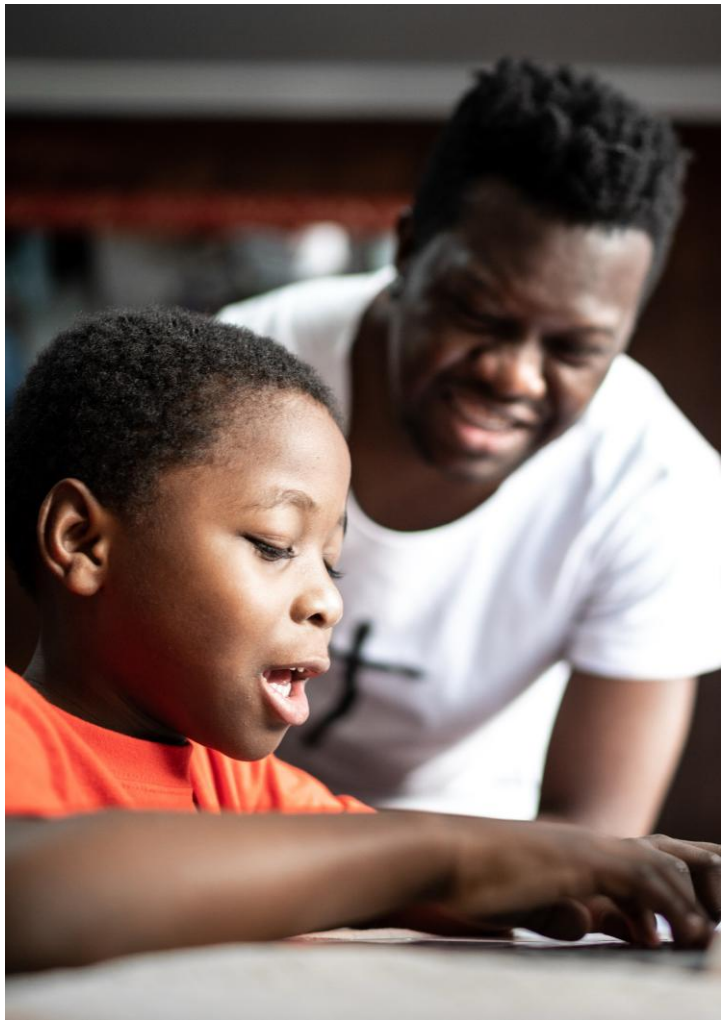
Guidance on the Agent Instructions

- The step-by-step instructions of what do do, and when.
  - Specifics on tone, channel responses, response format
  - When to trigger actions
  - When to escalate to a human agent
  - Examples of conversation flow.

Example:

- When replying to a question, offer one step at a time. Do not provide multiple steps at a time. Keep your replies concise.
** Use small words, avoid using acronyms, and assume that your users are not tech-savvy**
If they complain about poor speed, offer to send them a Realspeed test link via SMS using [[Realspeed_link]]. The results from this test will be provided to the agent when they accept the call.
Once the customer confirms that they have ran the test, offer to escalate them to an agent.

https://help.webex.com/en-us/article/nelkmxk/Guidelines-and-best-practices-for-automating-with-AI-agent



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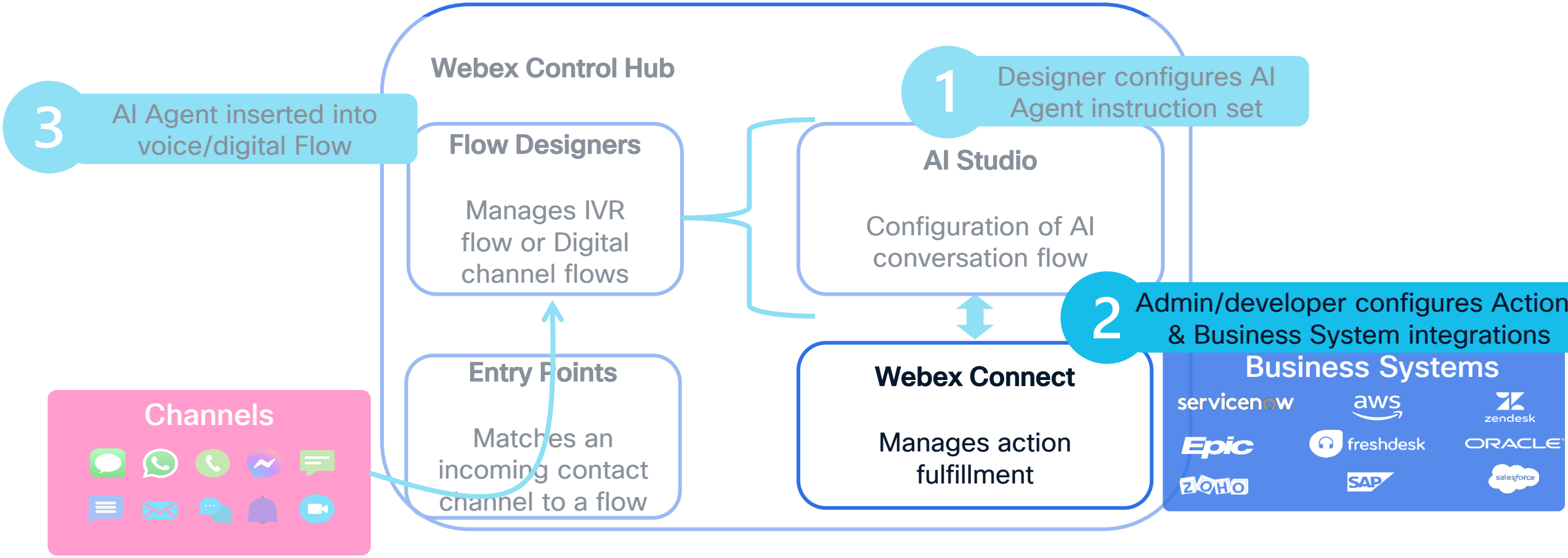
Connect’s Flow Builder



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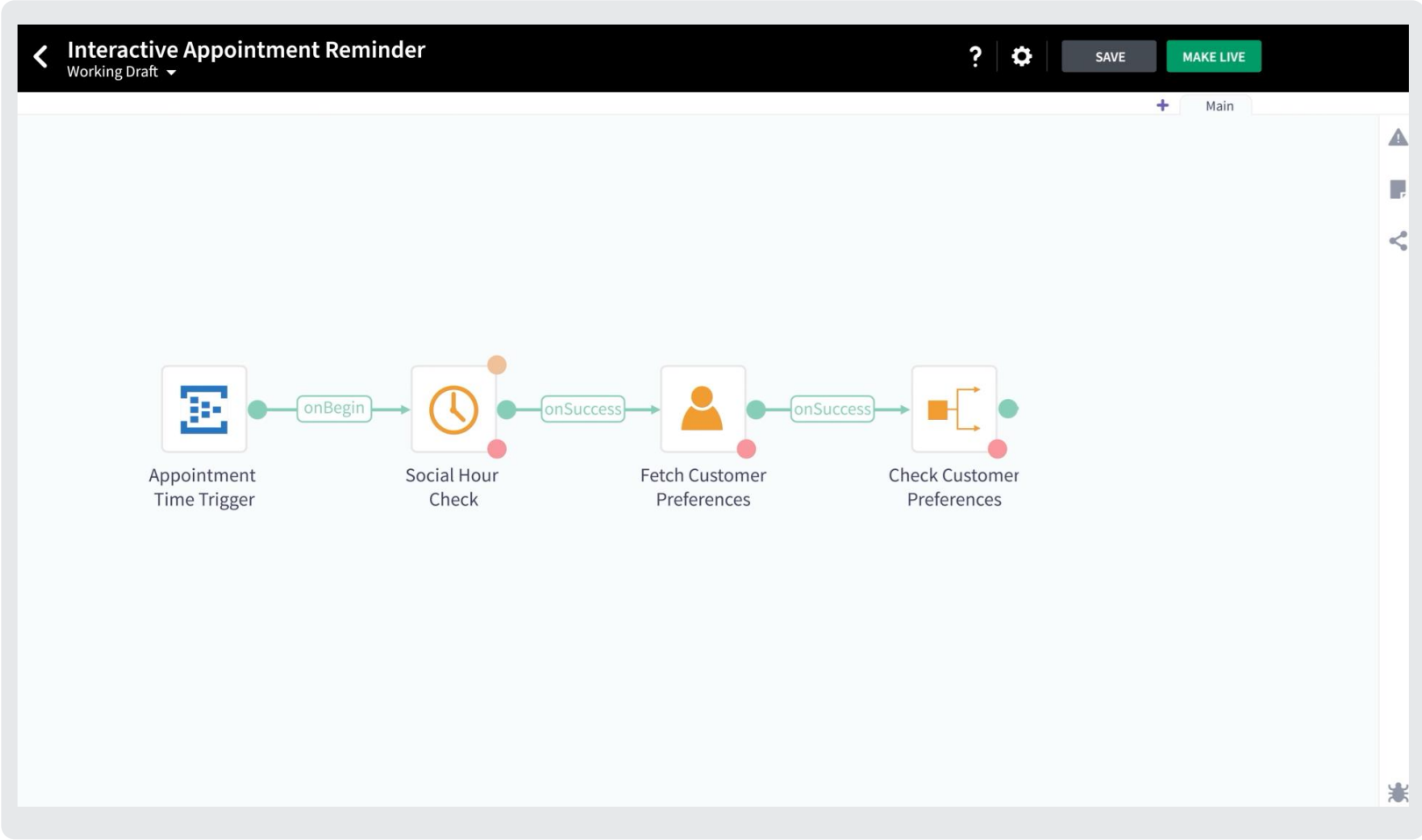
Webex Connect

Dictates routing logic for inbound messages

Low-code, no-code flow builder

30+ built-in tools, options for custom node integrations

Rapid delivery and updates to flow logic



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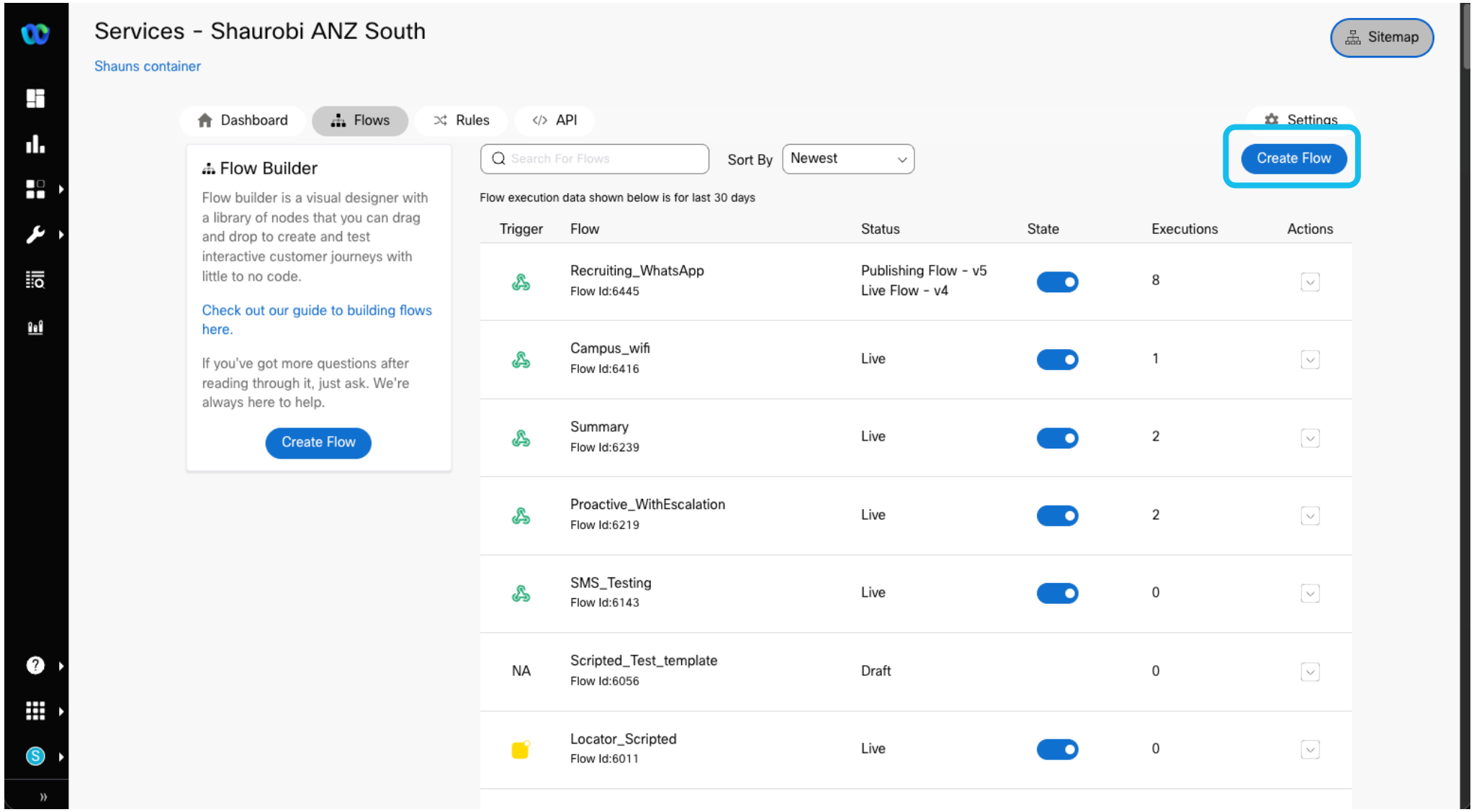
Creating a new flow



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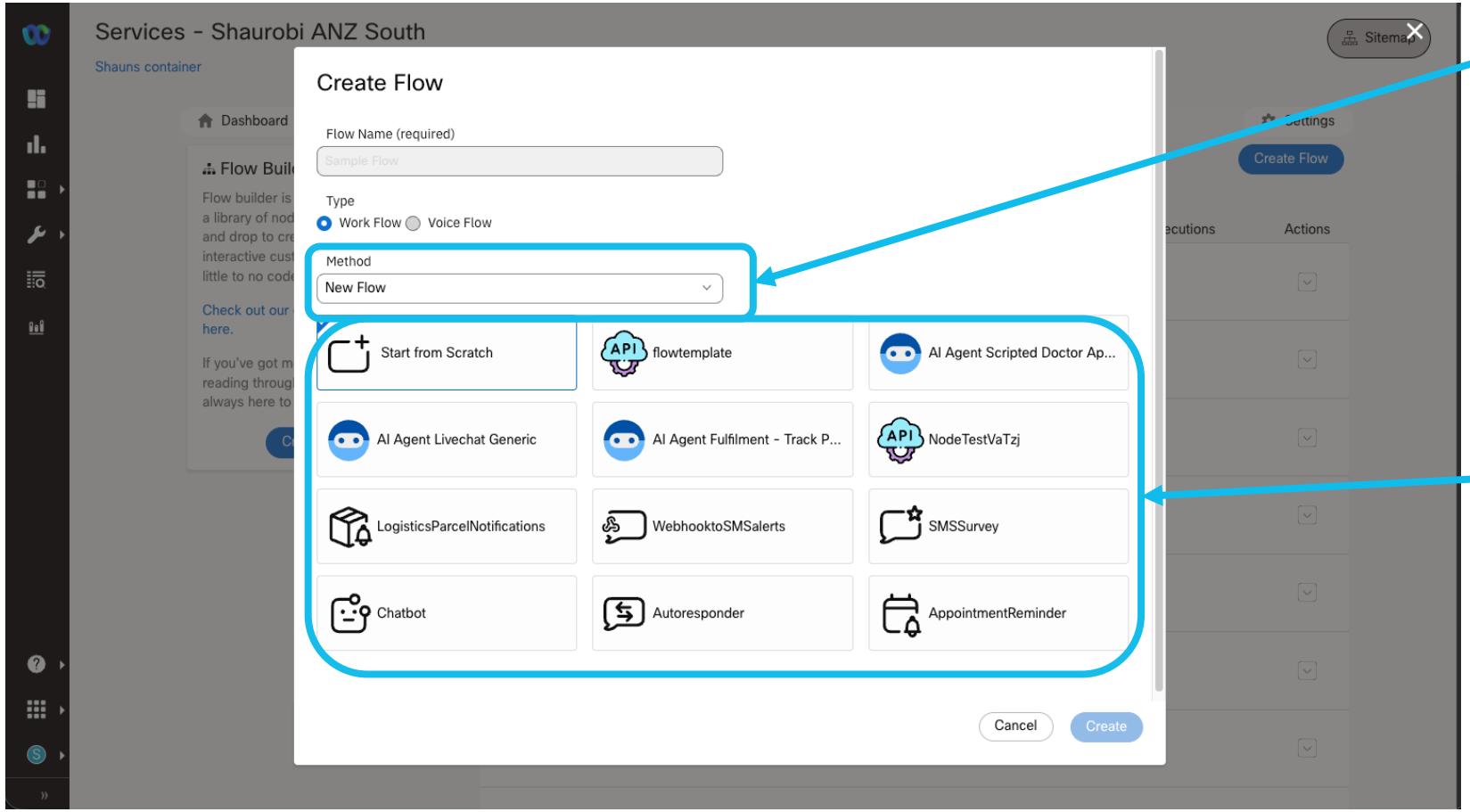
Creating a new flow



Create your flow.

1. New flow from scratch
2. Clone an existing
3. Import one from an offline file

Use an existing sample template to get started quickly.

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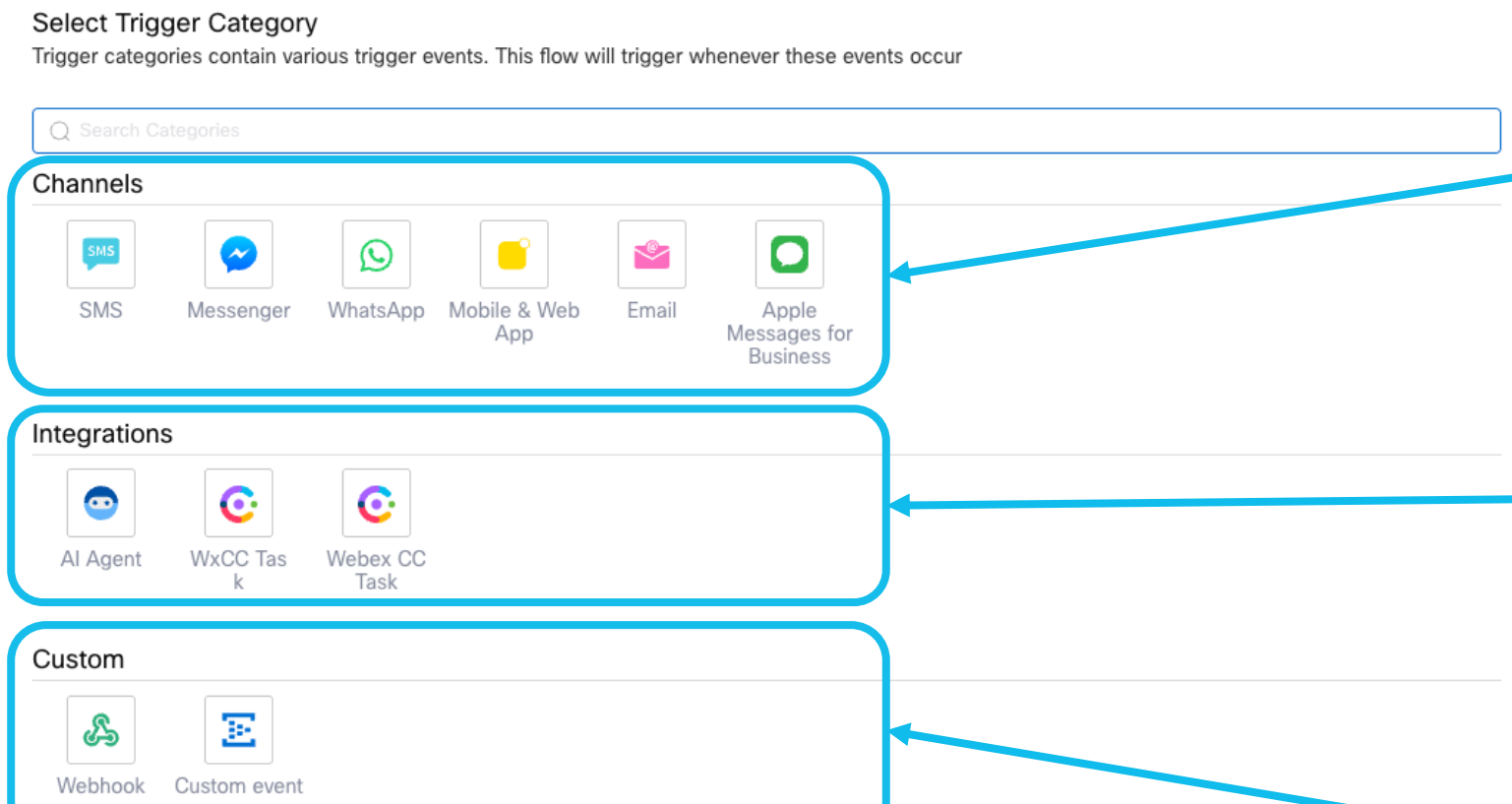
Trigger descriptions



Trigger the flow based on an incoming message

Trigger the flow with an AI Agent or Webex CC Task

Trigger the flow using an API Webhook or event from SDK

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The three steps to an action

Trigger payload

Define the input that the AI Agent should collect

- Customer identifier
- Booking time/date
- IT Incident information

Connect Workflow

Perform the actions

- Get/Set information on an external system
- Send a notification on another channel (e.g. SMS)

Return Variables

Collate the information to return to the agent

- Case information
- Message confirmation
- One-time PIN code

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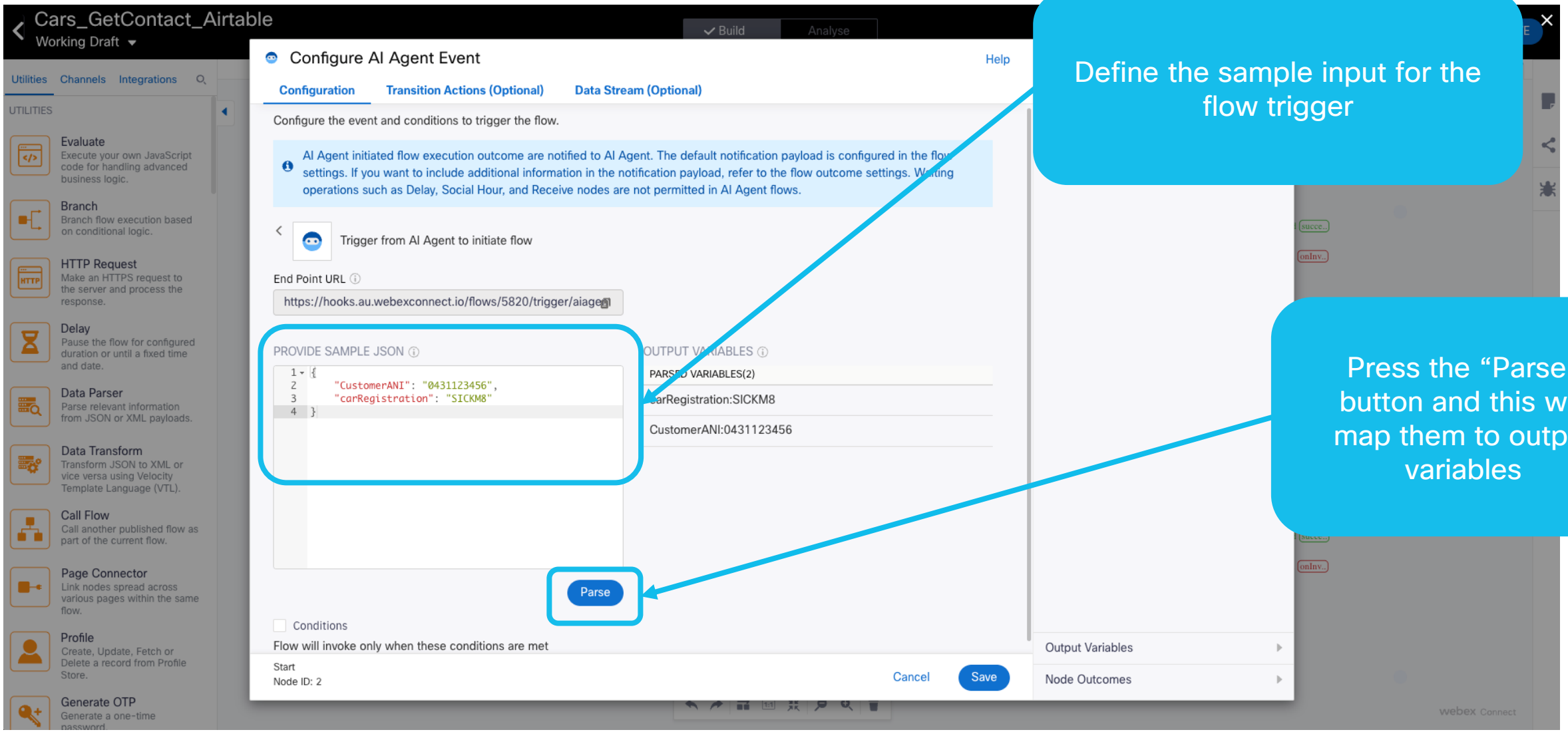
AI Agent Trigger



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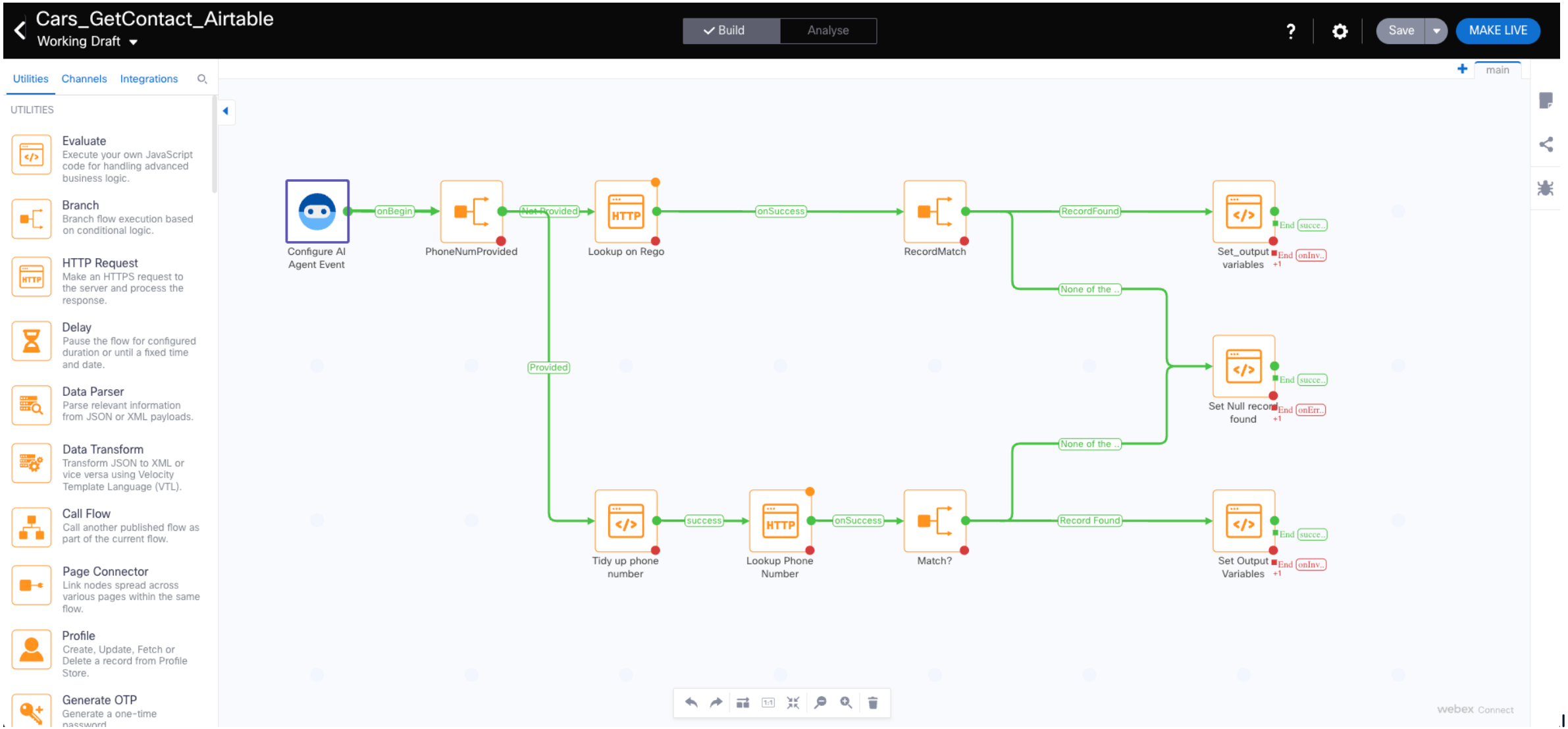
Sample flow – check customer record on either car registration or phone number



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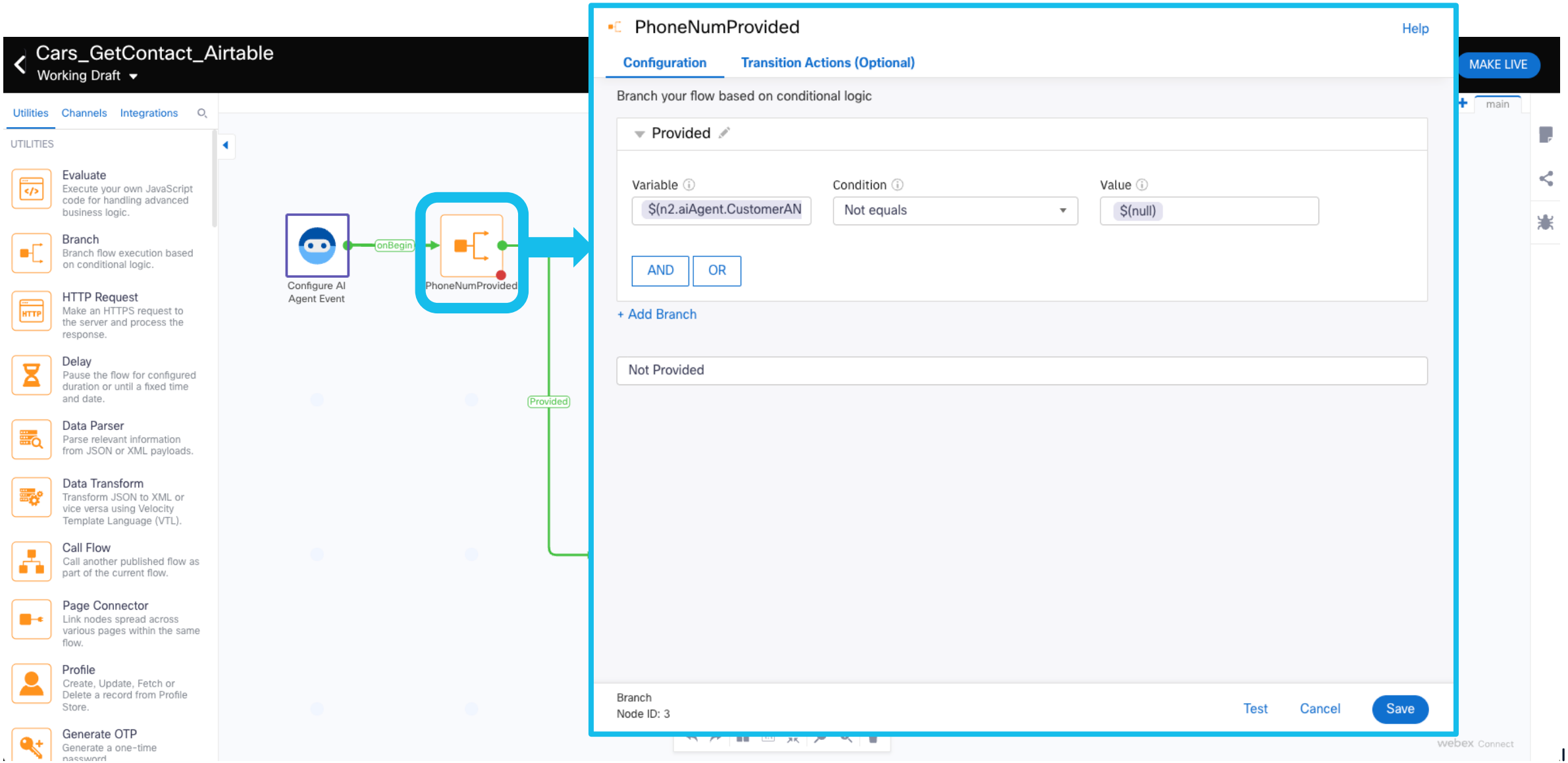
Did the customer provide a phone number?



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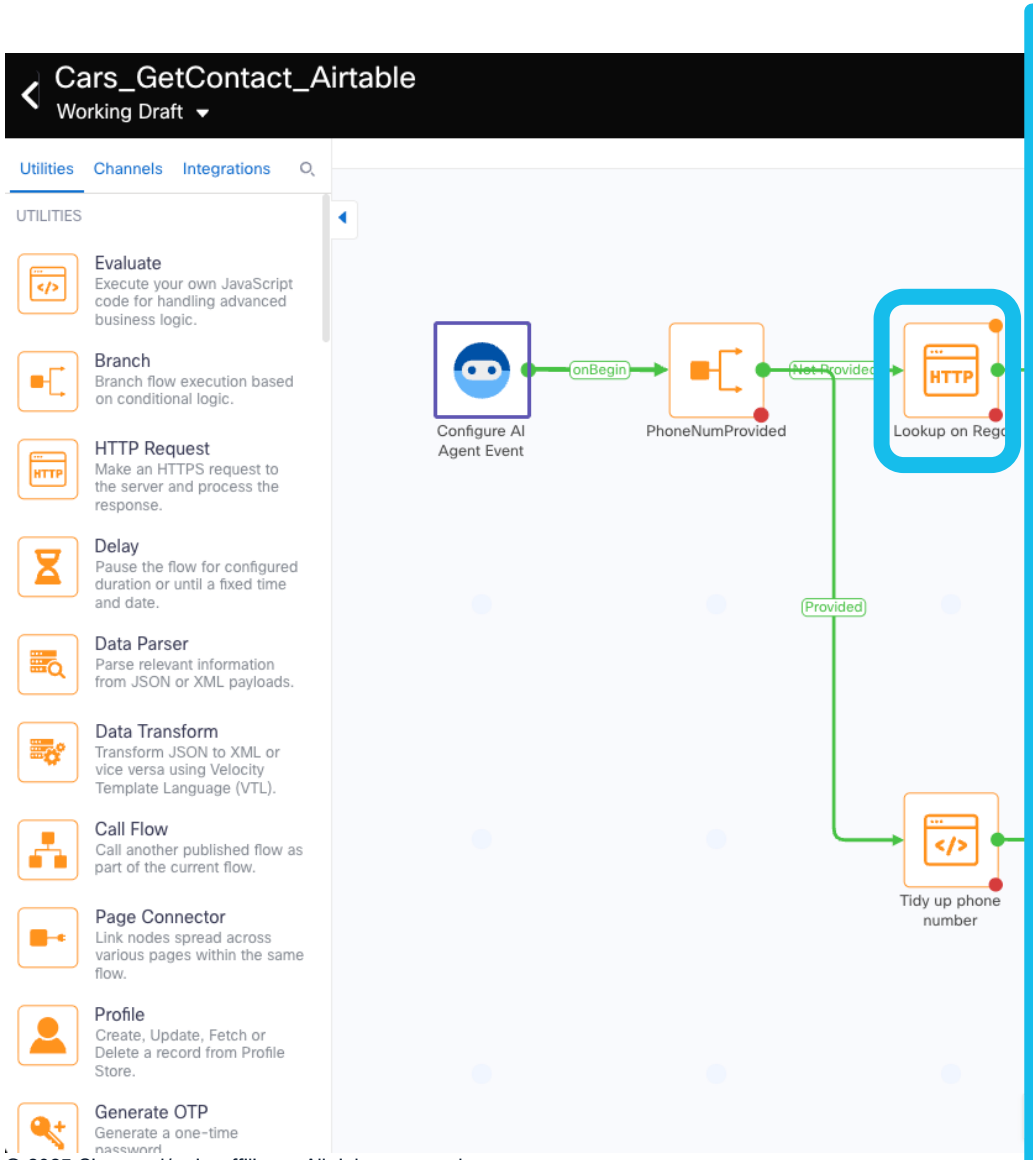
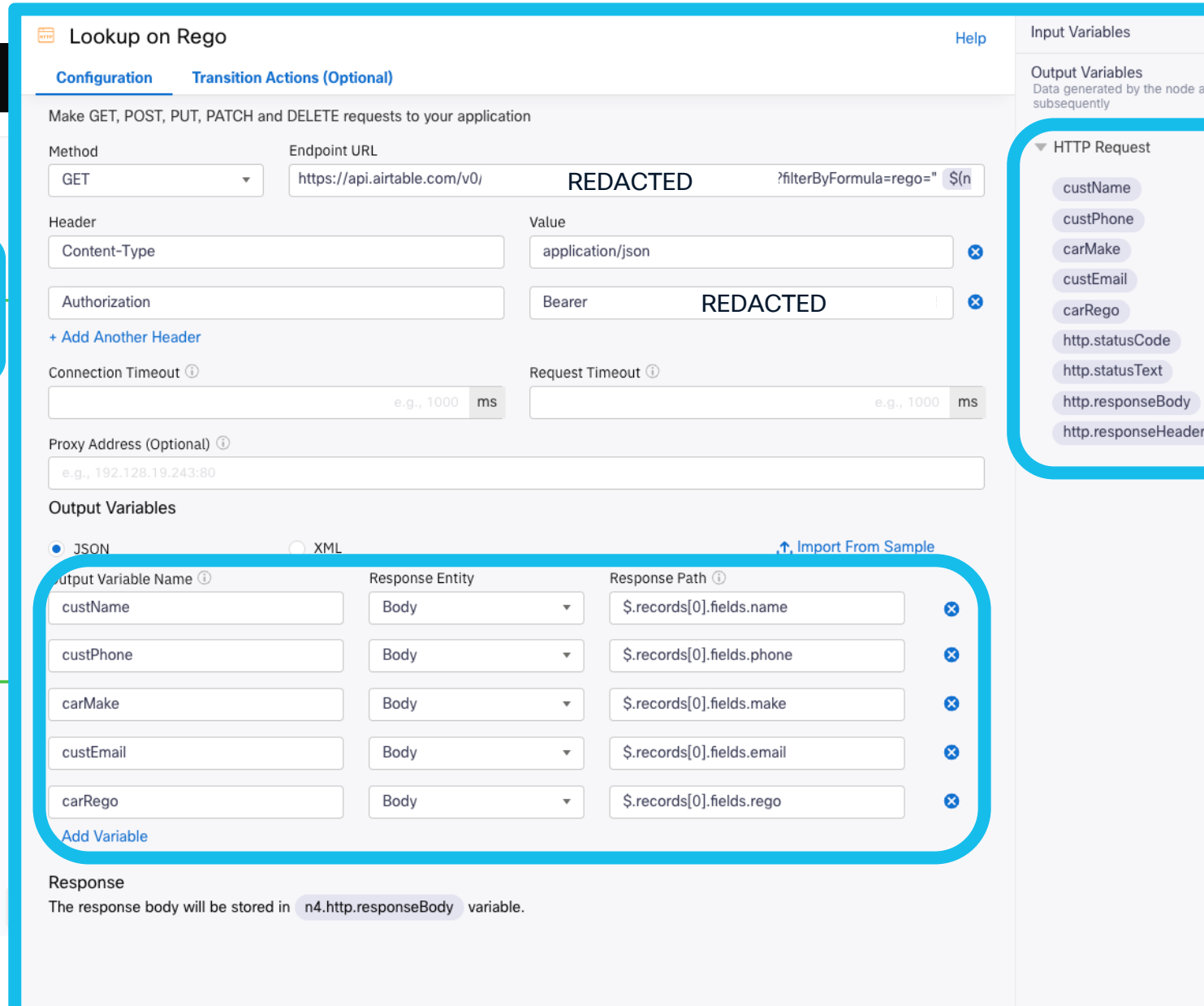
Let's check based on registration





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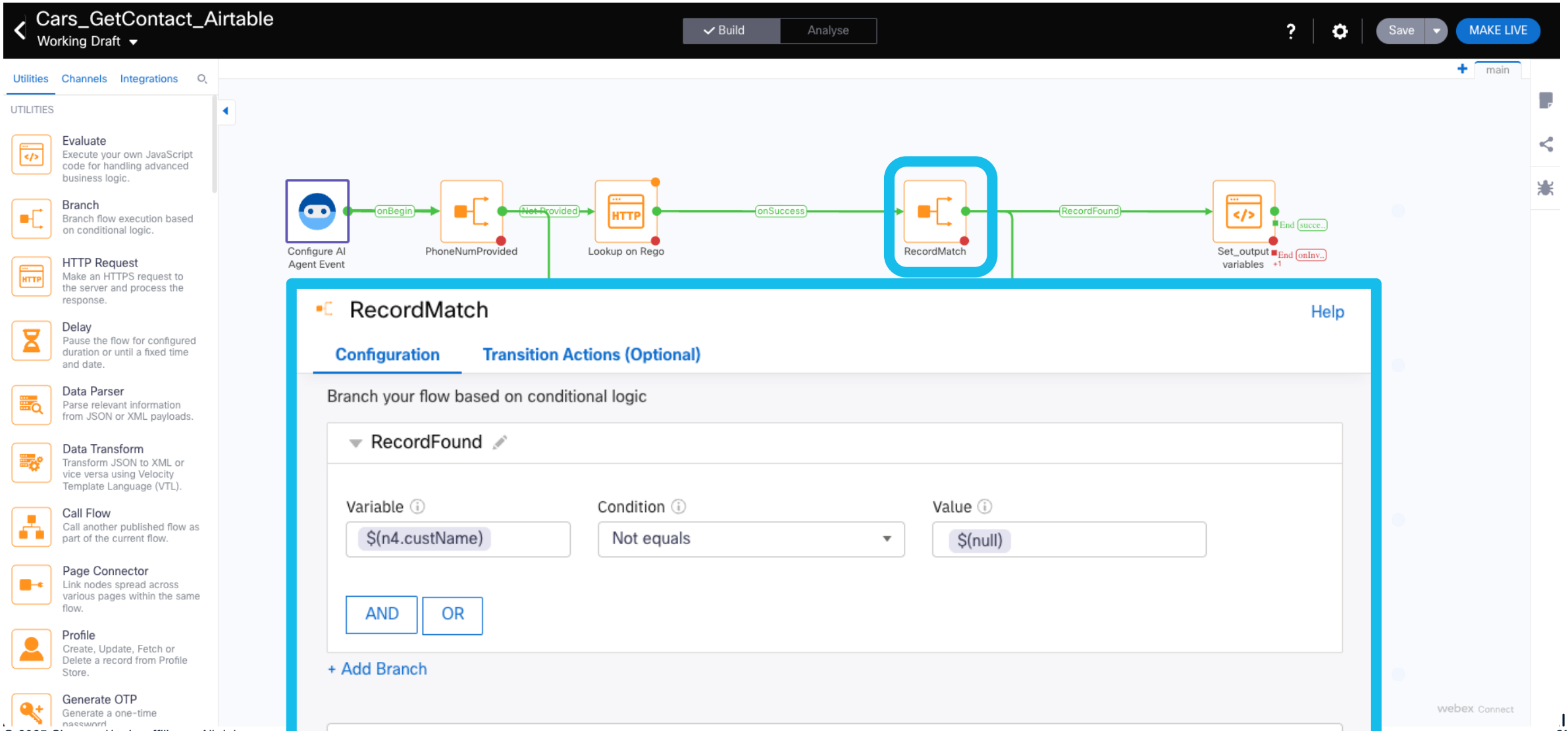
Did we get a match?



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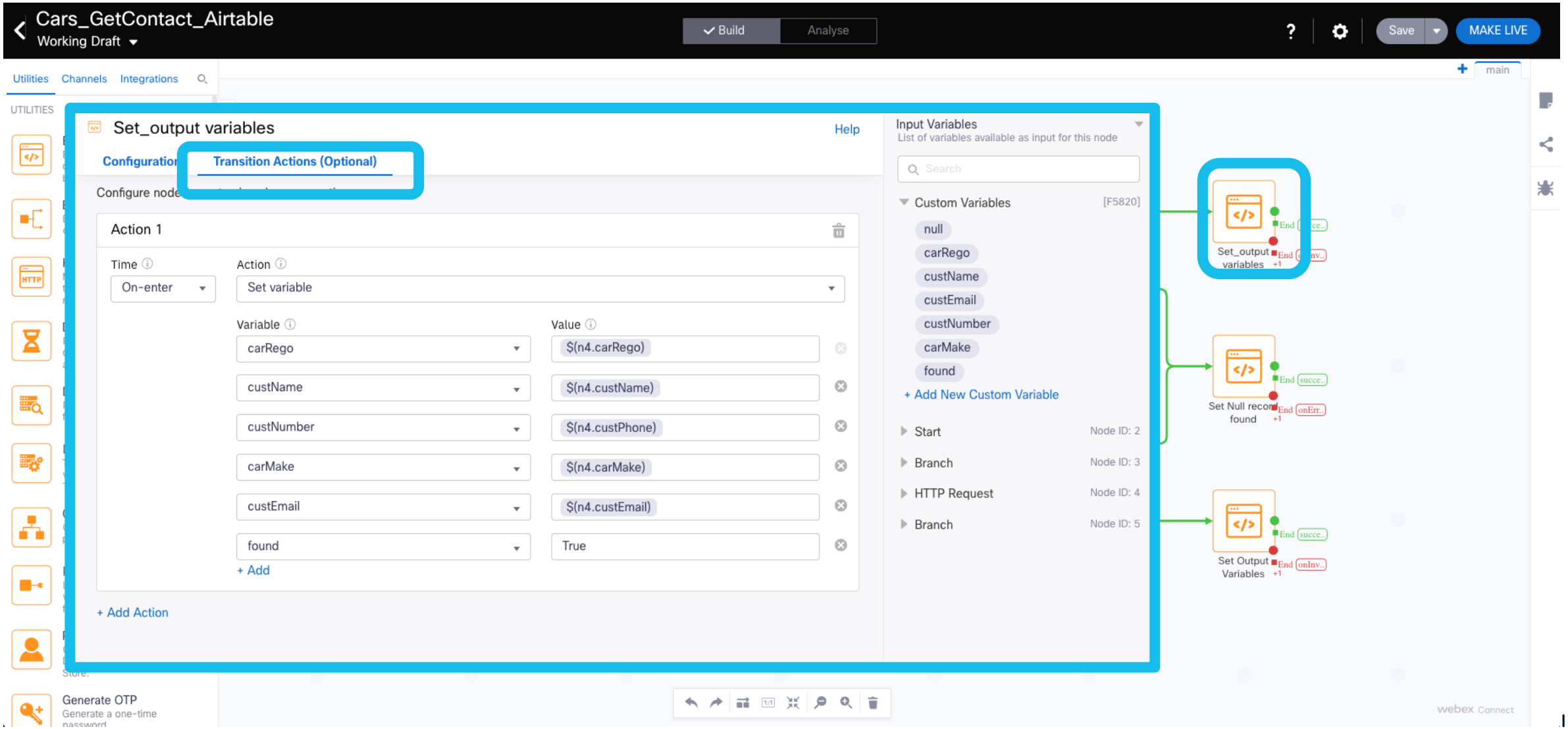
Let’s map them to custom variables (best practice)



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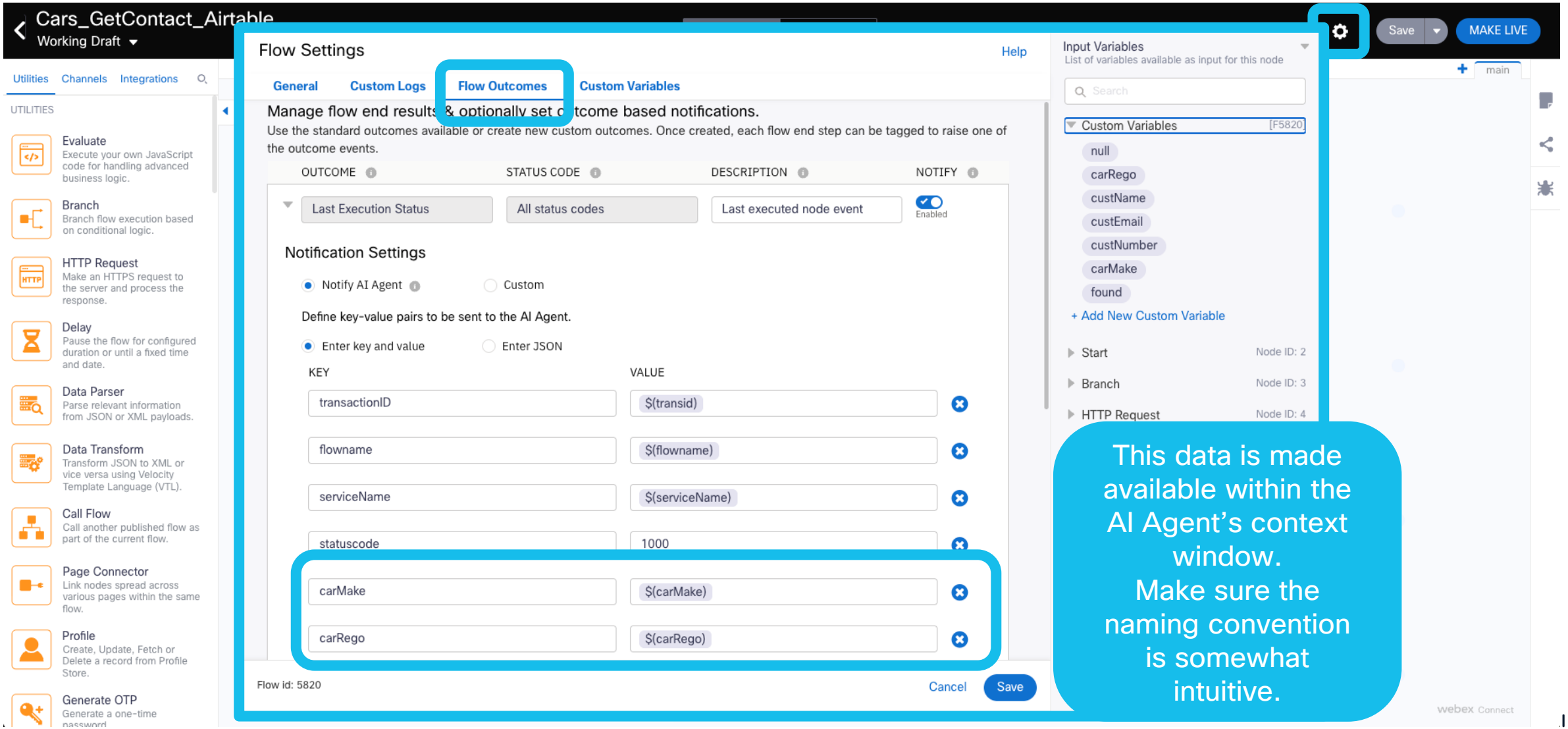
And finally, let's return them to the AI Agent



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Why were the Custom Variables best practice?

Depending on whether the customer supplied Registration and/or Phone number, there were two lookups I was making.

Mapping the output of those lookups to custom variables meant I was applying the output correctly regardless of the flow path.

This is important if you’re API dipping one system multiple times, or multiple systems for a complete record.

Also, defining a “null” custom variable makes it easy to check for empty variables

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“But Shaun, I don’t want to be building an HTTP Request for every CRM dip!”

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Custom Nodes are your answer for repeatable API integrations

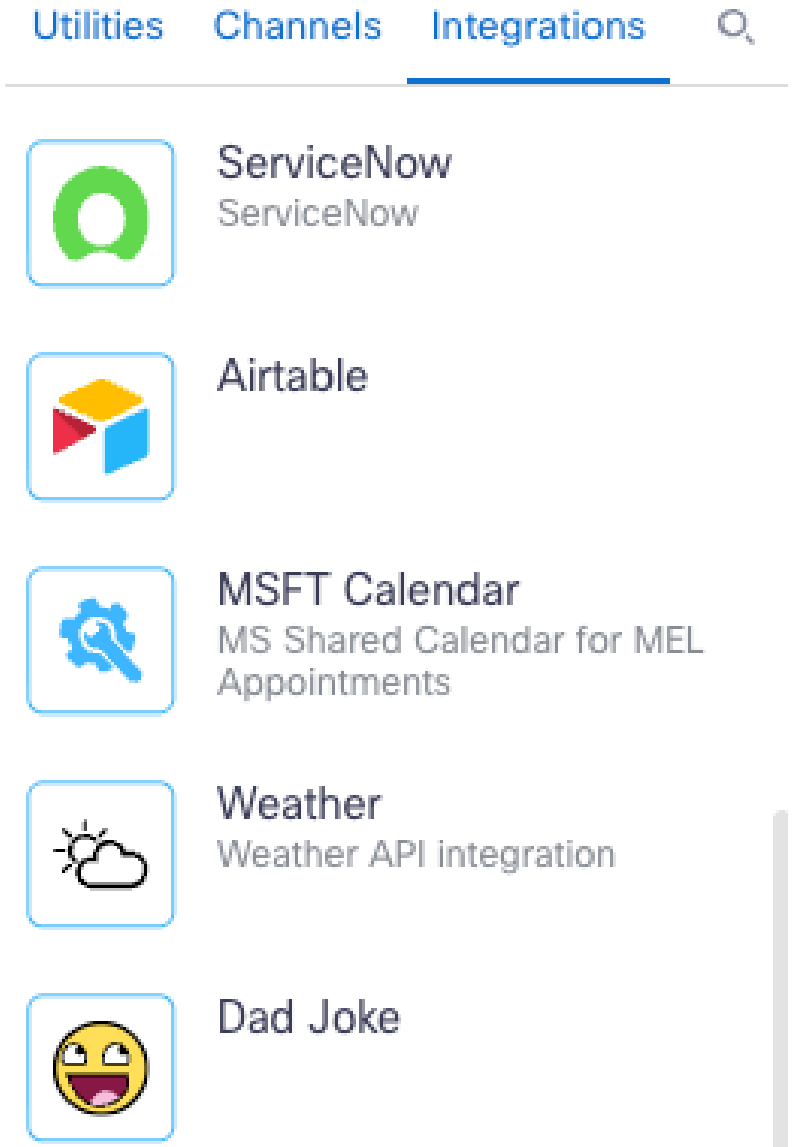
Custom Nodes provide a reusable node for common API calls within your enterprise.

Contain OAuth credentials within the Custom Node and hide them from your flow developers.

Define your API calls once, inside GUI, and make it an easy form for flow developers to leverage.

Expand beyond the pre-built Nodes to other calls:

- sObject queries in Salesforce
- Table API in ServiceNow
- Dataverse API in Dynamics
- Graph API for Entra ID



BRKCCT-2556
Developing Customer Experience Integrations
Check the recording!

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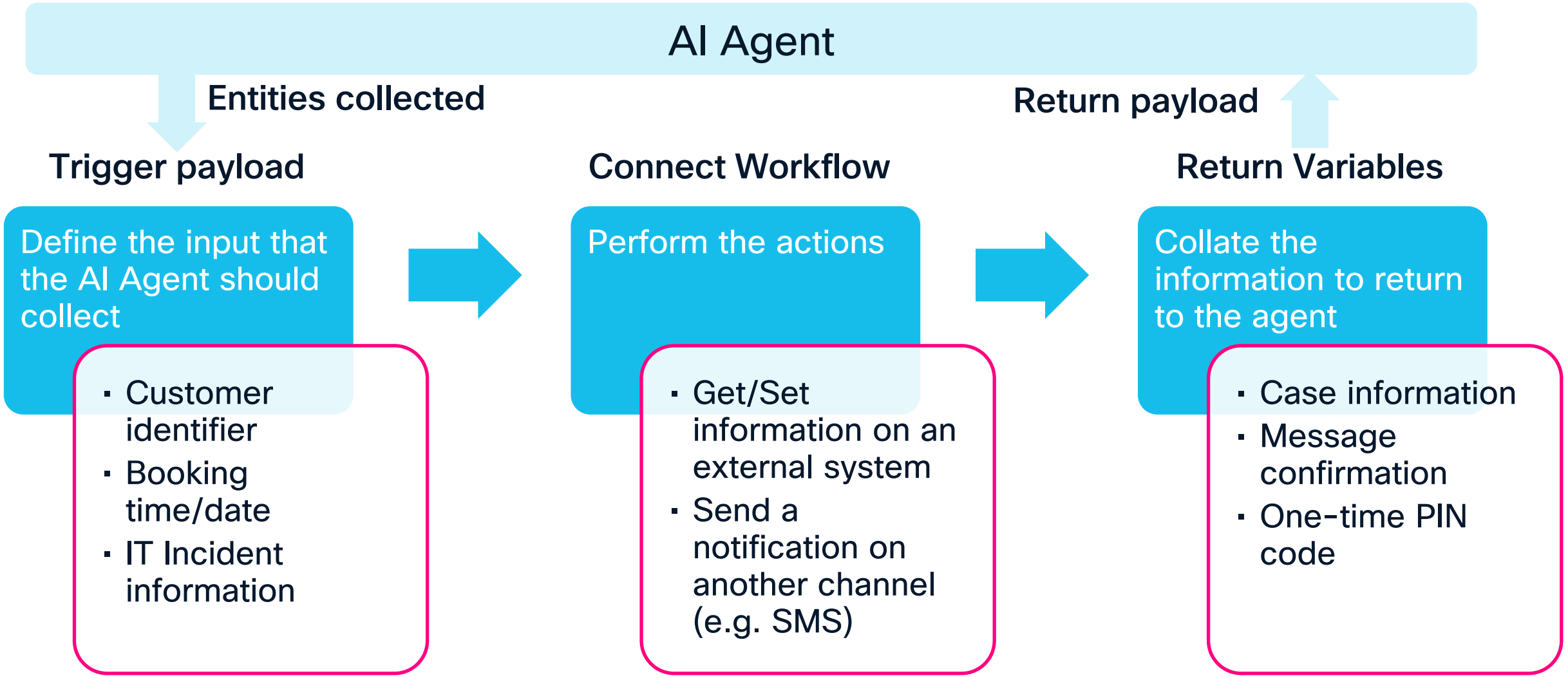
Putting things into Action!

The three steps to an action



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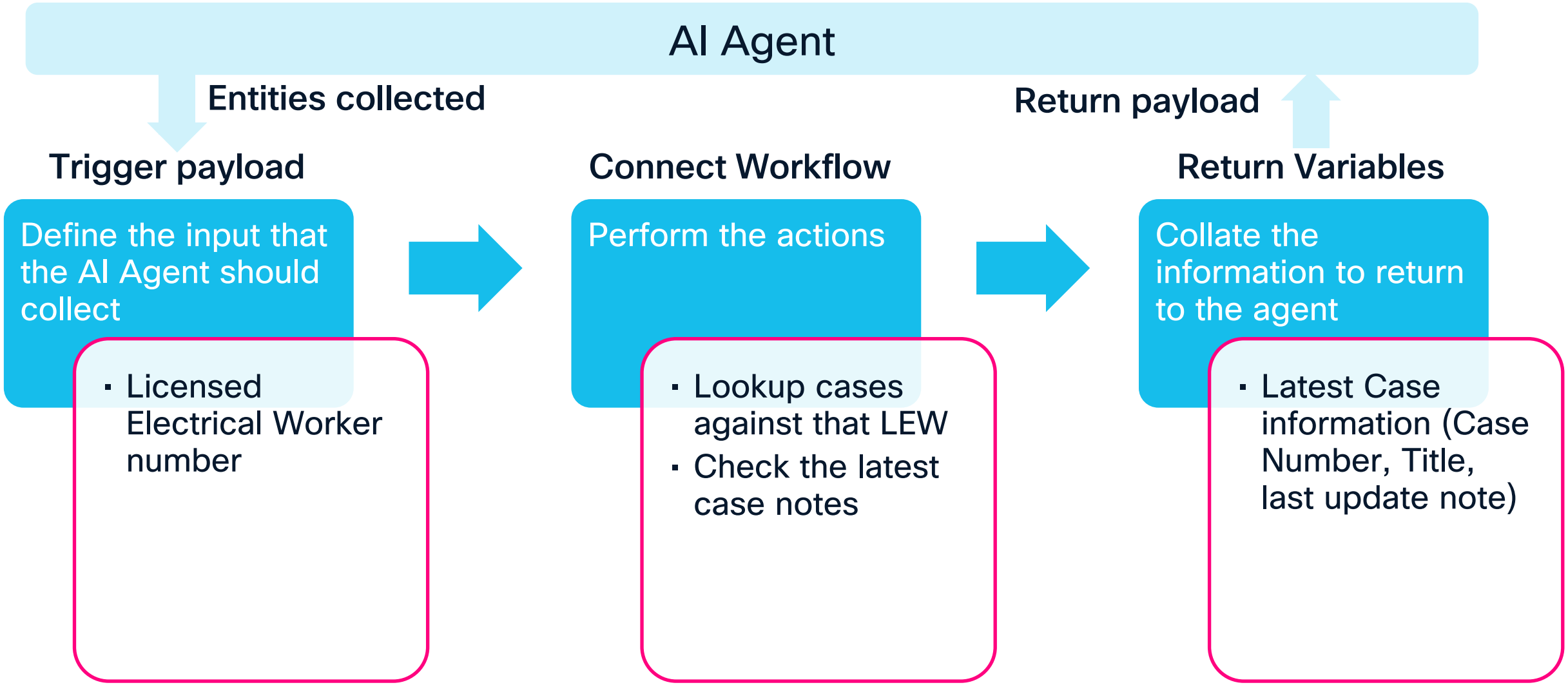
Checking a new connection request



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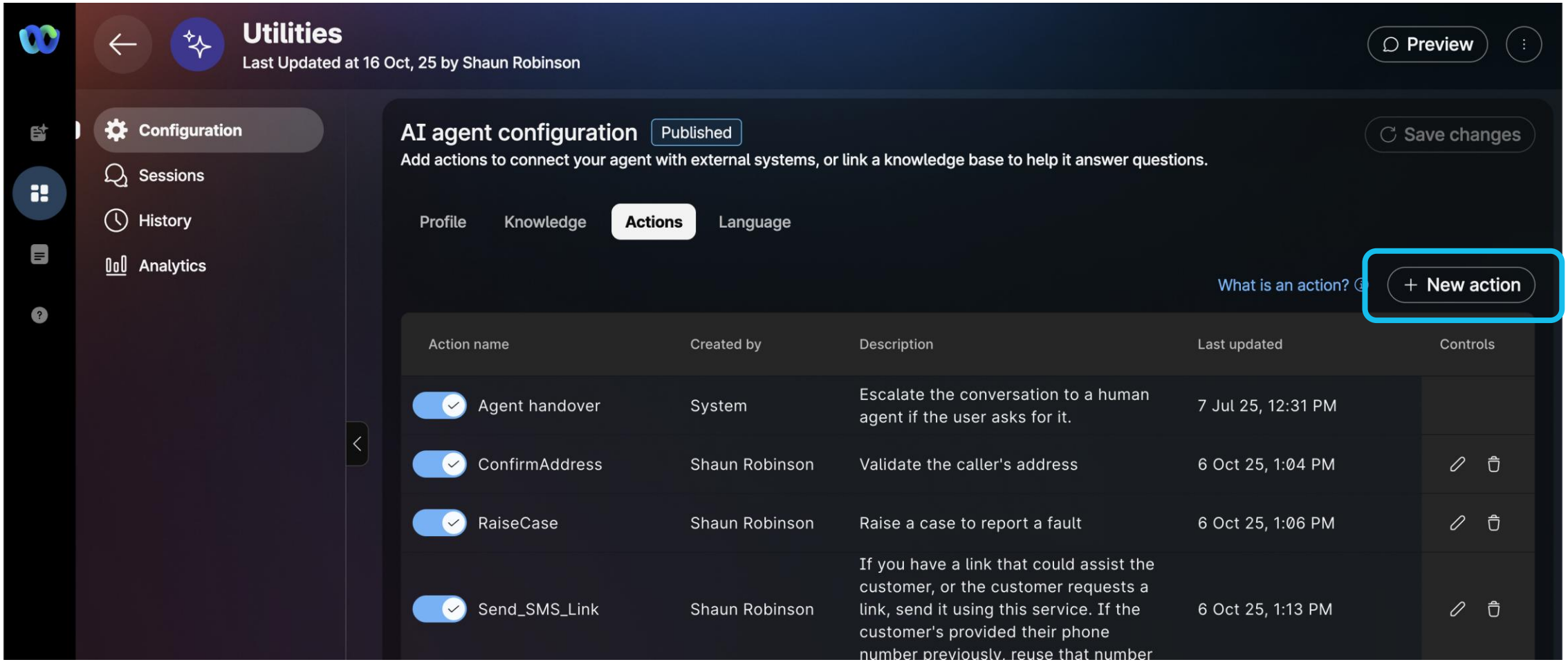
Where the Action is



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Defining the action

Action Name

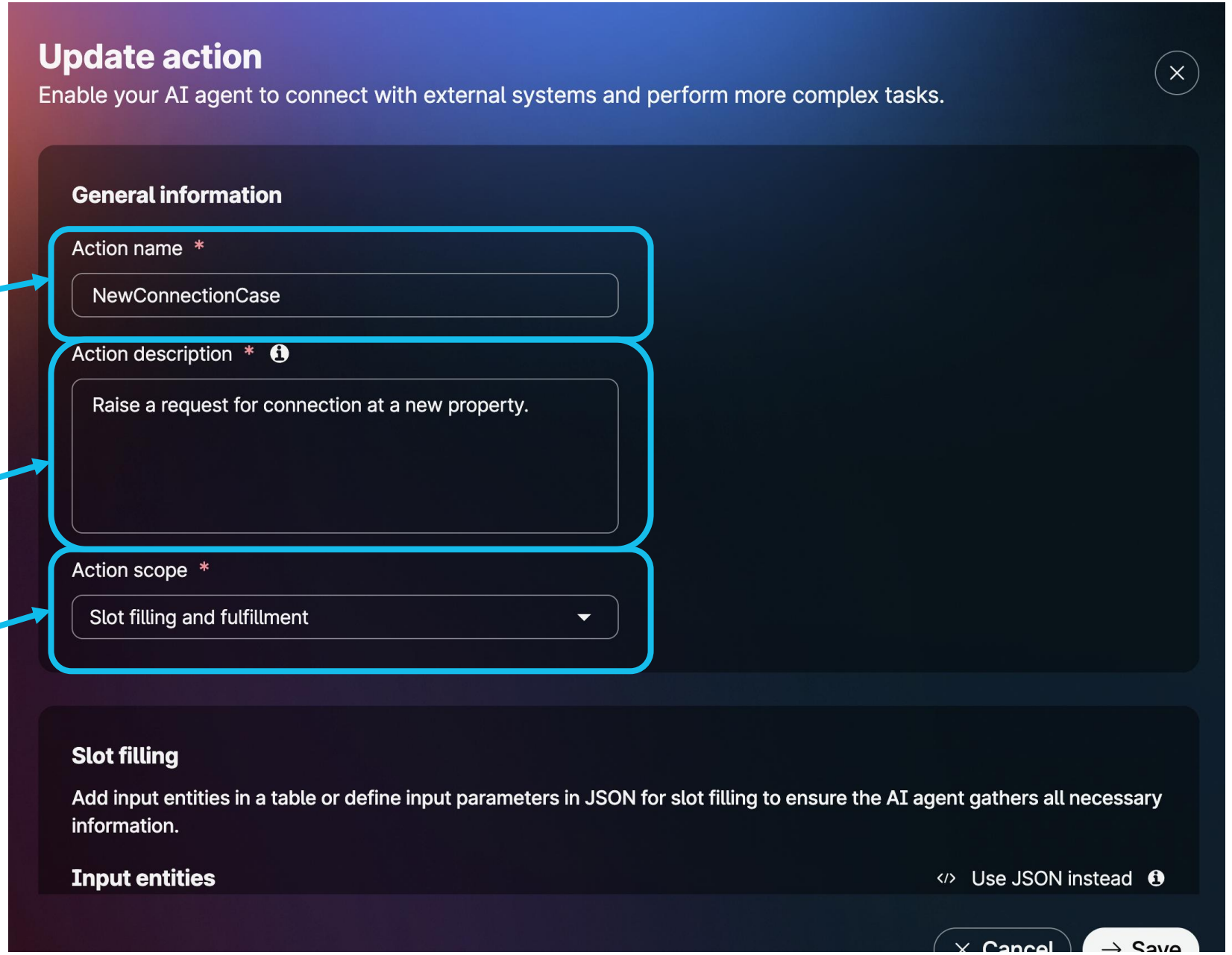
Used when invoking the action from the Instructions pane

Action Description

Further instructions on what this action should do.

Action Scope

Slot Filling + Fulfillment



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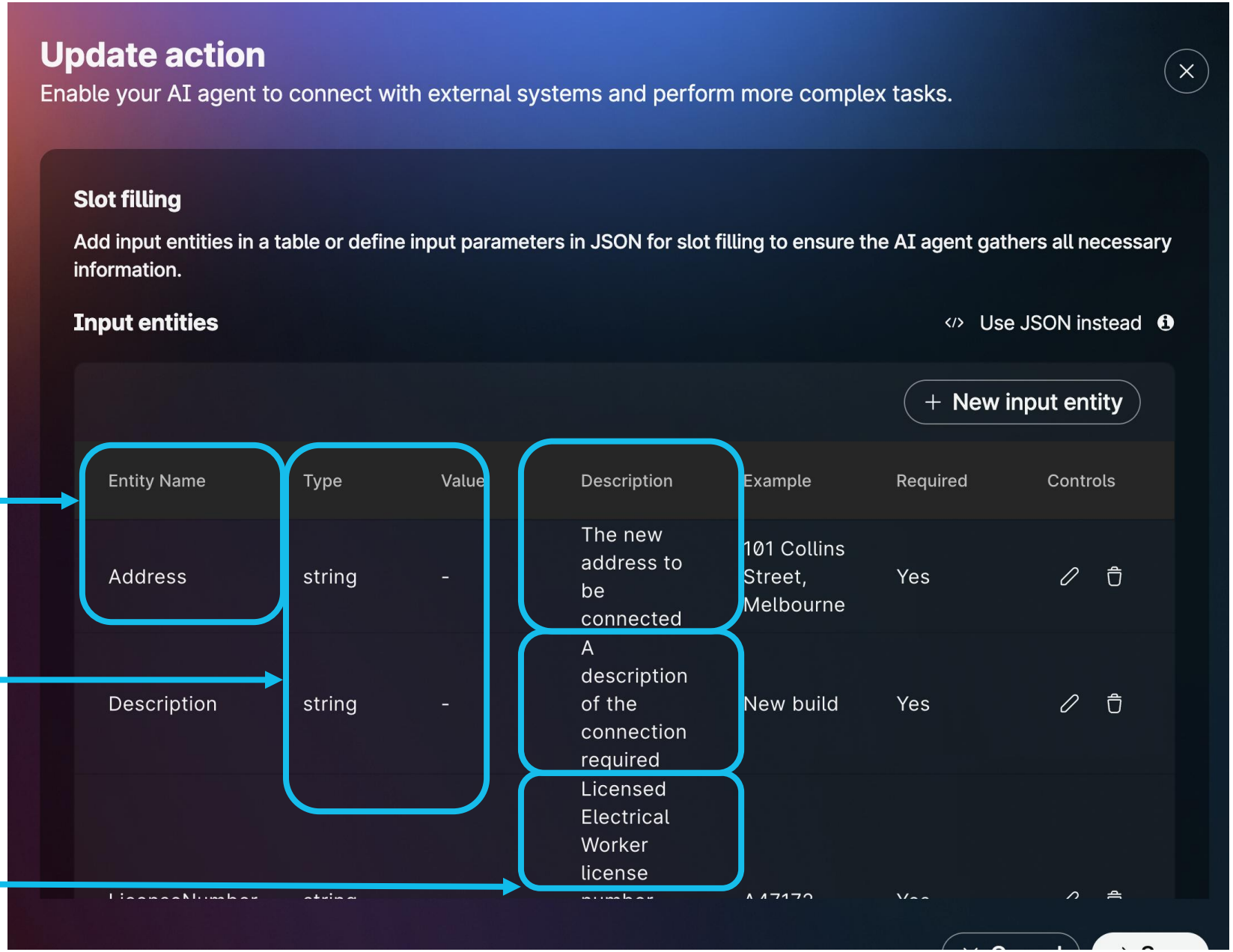
Defining the slots to be filled.



Entity Name

Input entity, matches to the data payload in Connect

Entity Type

String, Email, Digits, Phone, Date, Time, Regex, Number or Custom List

Entity Description

More instructions for the AI Agent on the entity.

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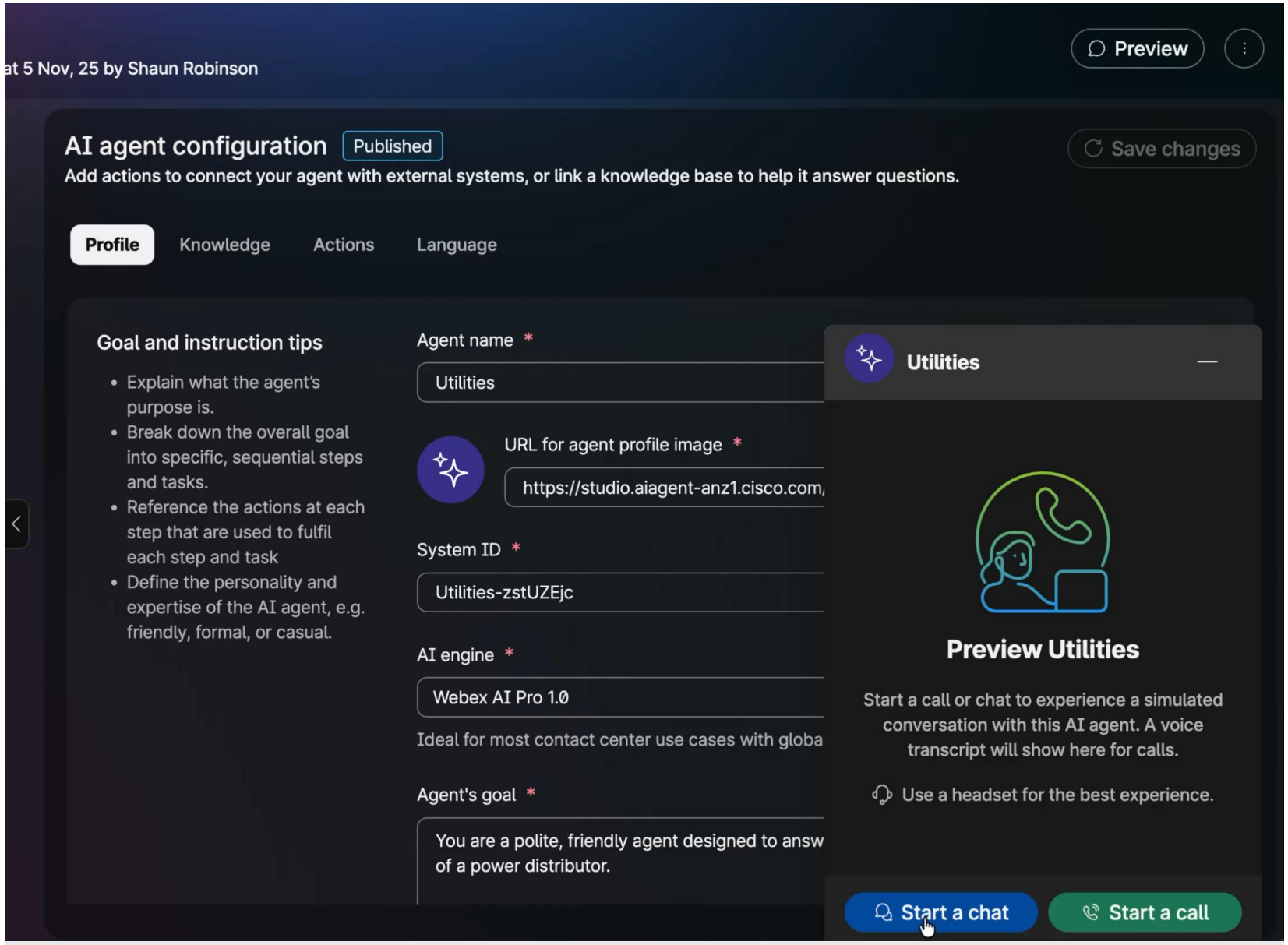
Let’s test it out!



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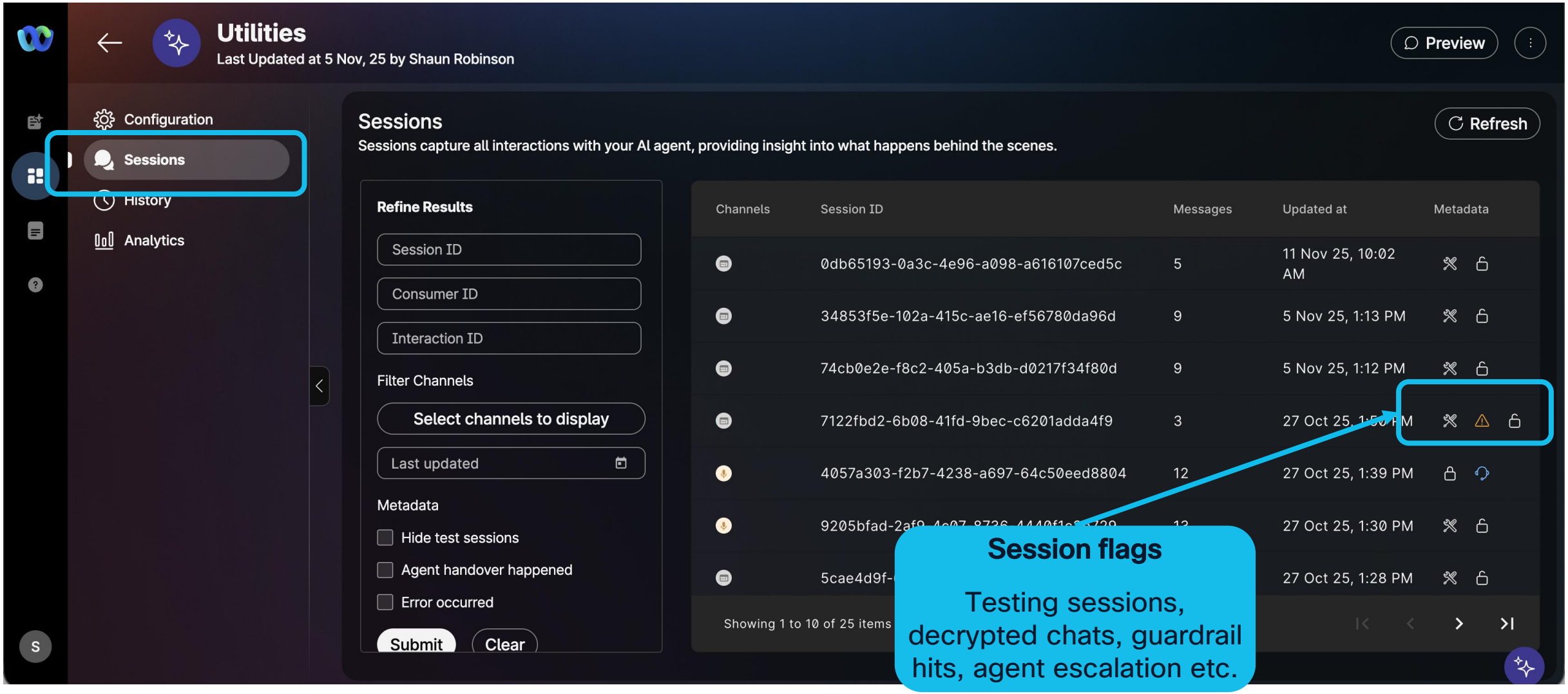
Debugging actions in AI Studio



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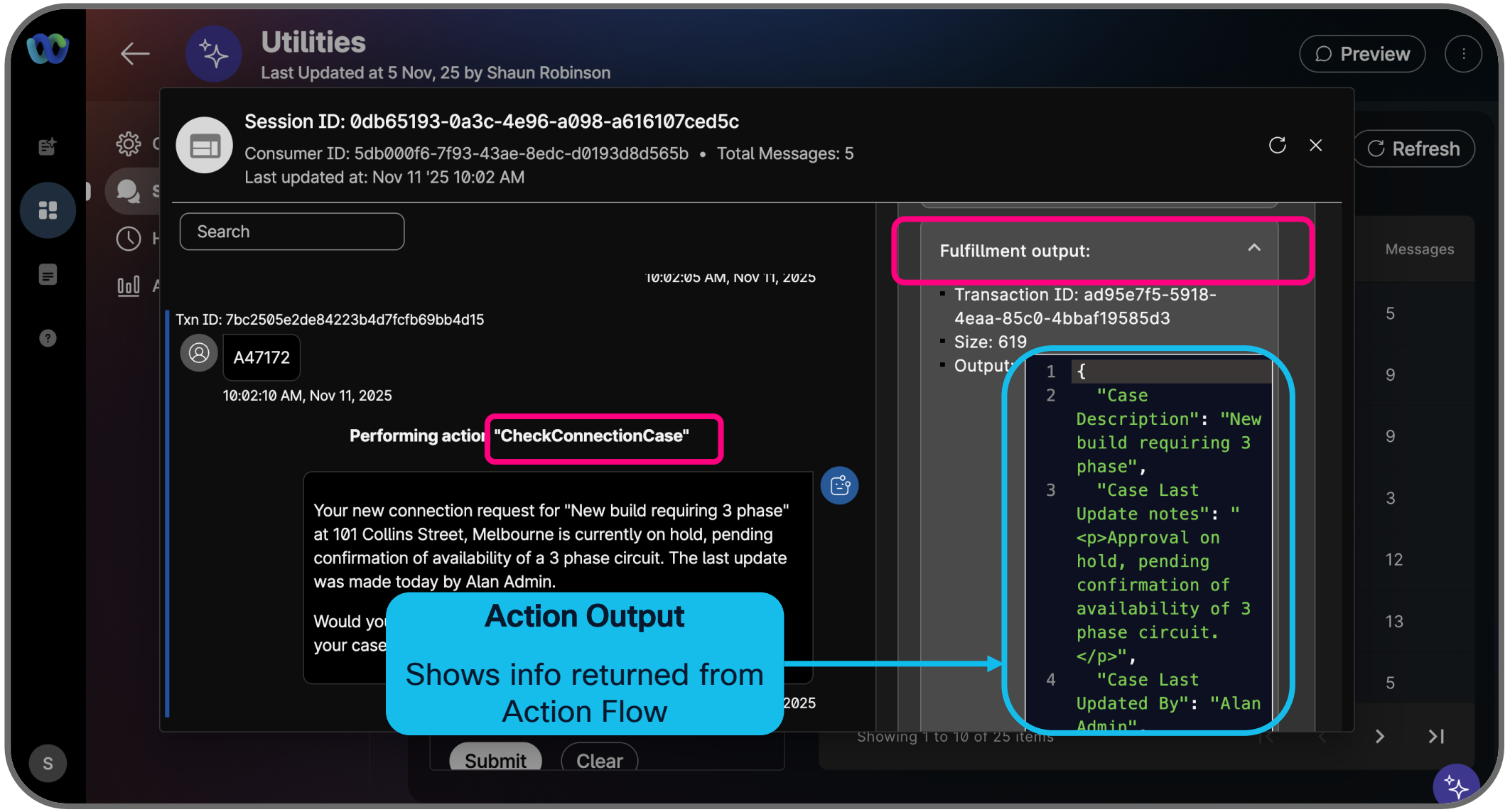
Checking action fulfilment



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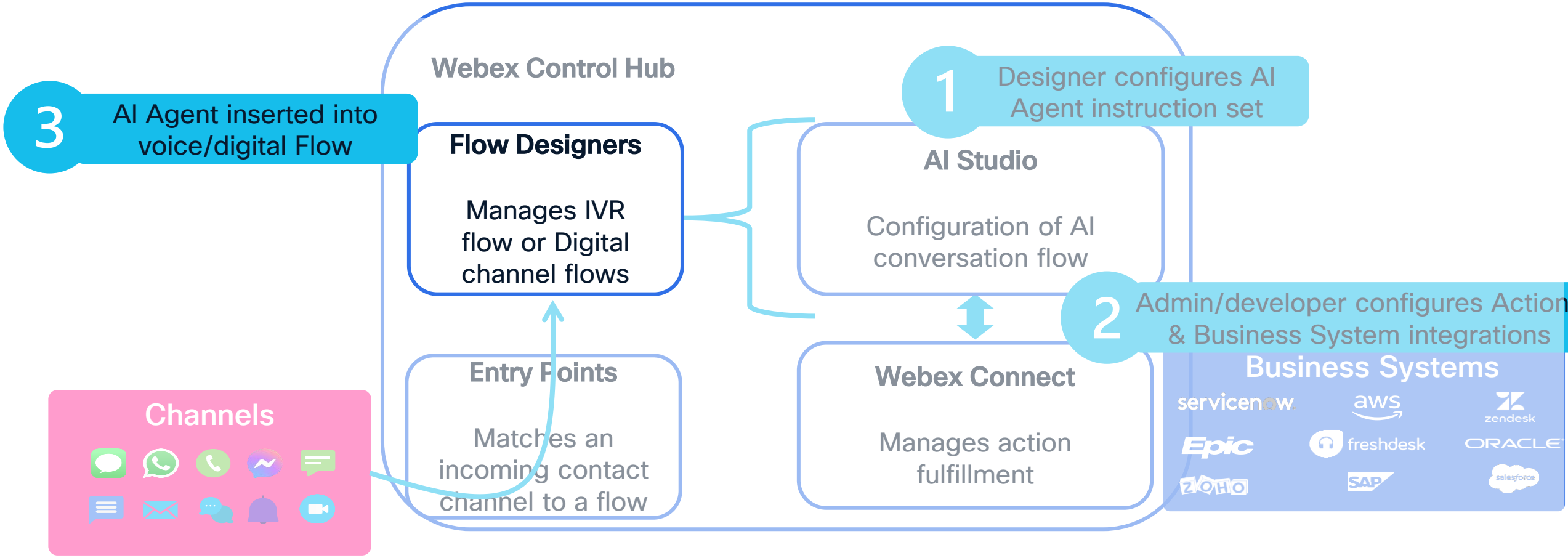

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Adding AI Agents to Customer Experience Flows

Let's integrate AI Agent functionality into our customer flows before proceeding with implementation details.

Unified configuration approach

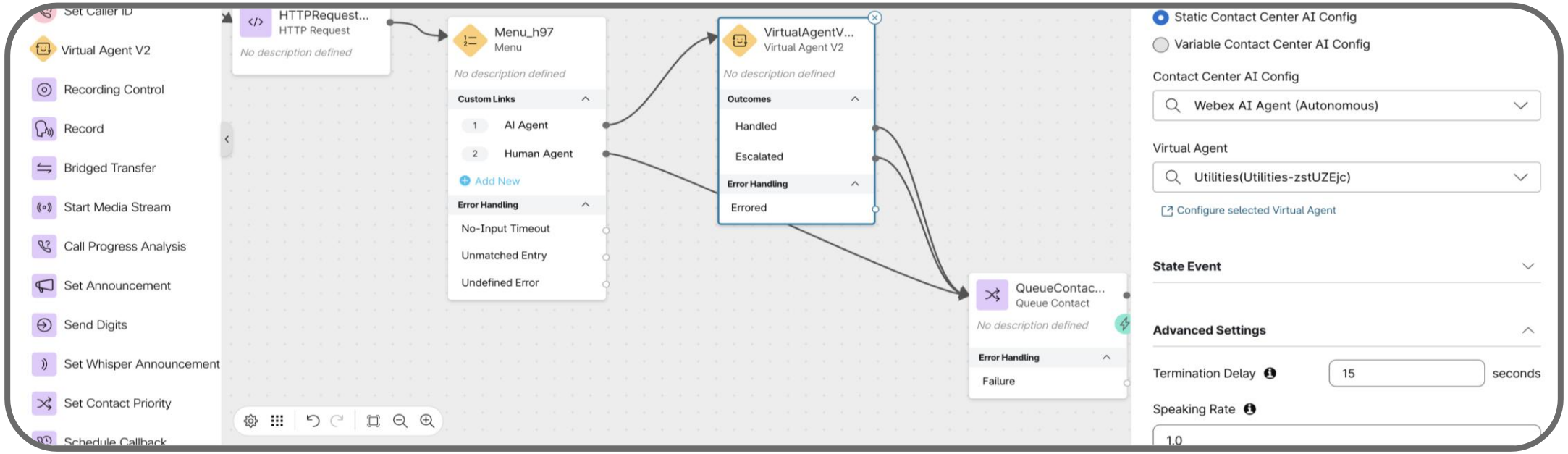
AI Agent configuration is contained in the Virtual Agent Node for Voice and the AI Agent node for Digital Channels.

Reusable AI assets

Allows reuse of one or multiple AI Agents in different flows across voice and digital touchpoints.

Automatic propagation

Ensures that changes to the AI Agent are propagated automatically across digital and voice experiences.



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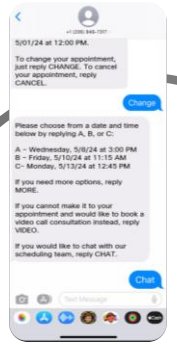
Handling AI Agent escalation

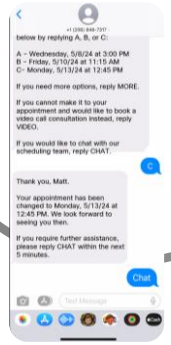
Providing agent context

Anticipate needs



Proactive notification

24/7 Front door

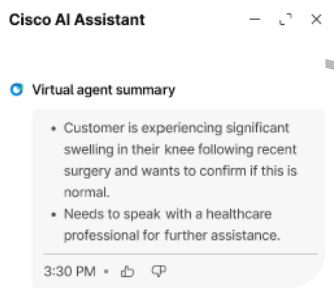


Self-service

Fulfil requests automatically

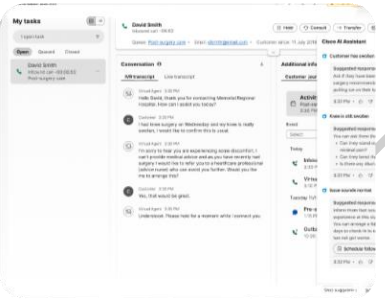
Interaction with Business Systems

Seamless handover



Handover to human agent

Empathetic humans



Agent engagement

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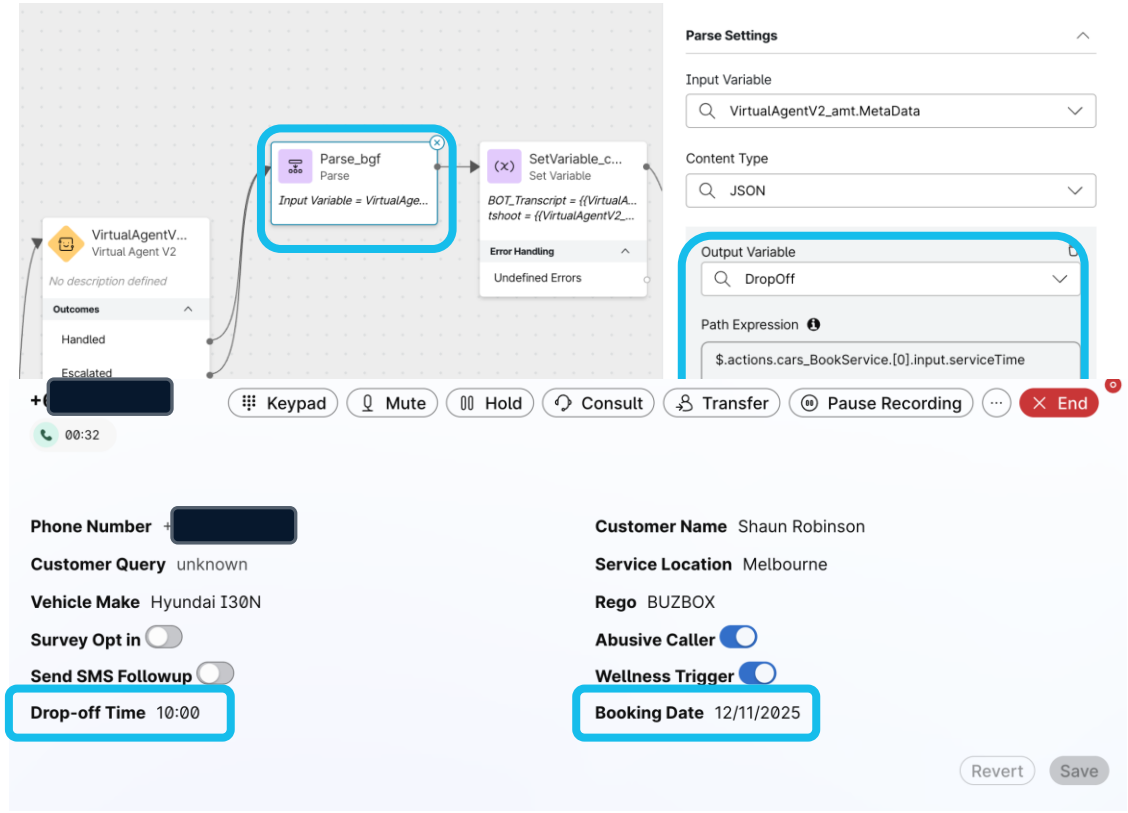
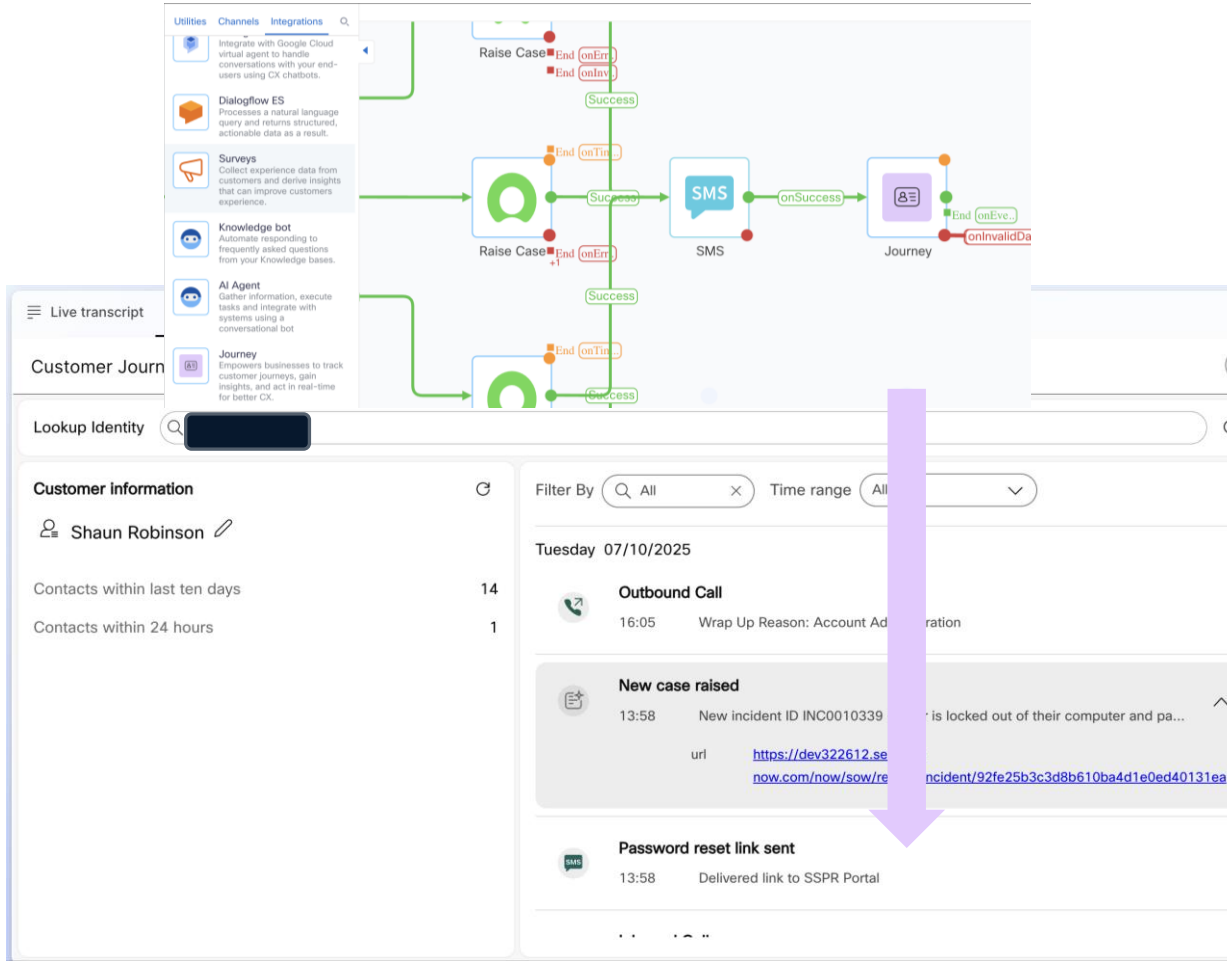
Providing Agent information upon escalation

Parse AI Agent interaction information out of the metadata, present it into the Agent Desktop as a CAD variable



Ensure AI Agent actions are generating Journey Data Services events



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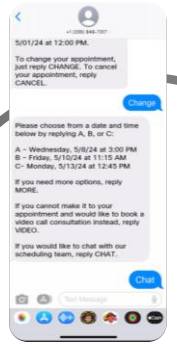
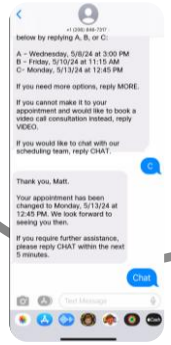
Empowering your agents

Anticipate needs



Proactive notification

24/7 Front door

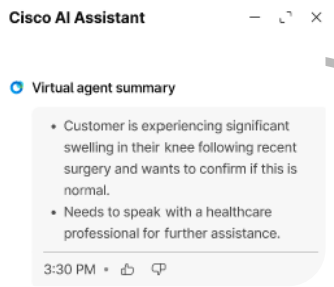


Self-service

Fulfil requests automatically

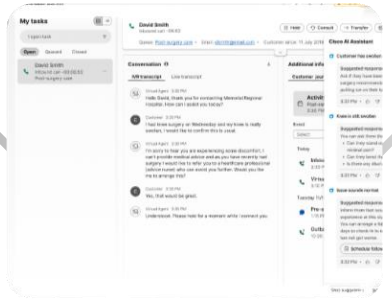
Interaction with Business Systems

Seamless handover



Handover to human agent

Empathetic humans



Agent engagement

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AI Assistant Capabilities

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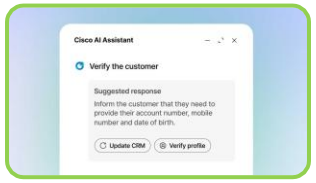
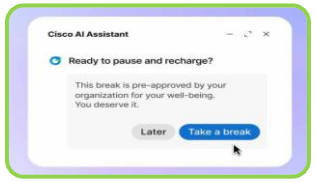
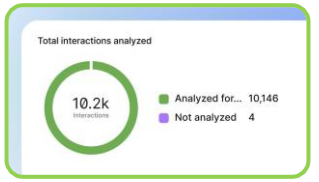
Designing Modern Agent Experiences with AI Assistant
Check the recording!



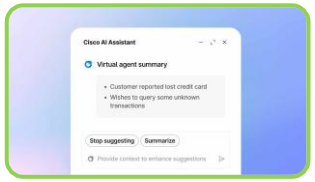
Suggested Responses



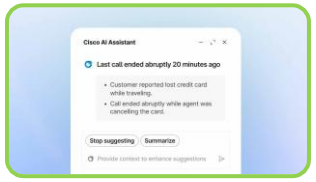
Agent Wellness Breaks



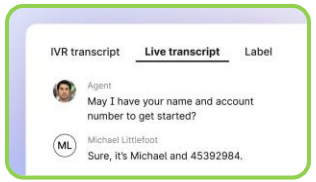
Topic Analytics



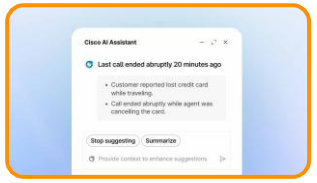
AI Agent context transfer summary



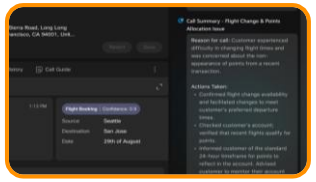
Dropped call summaries



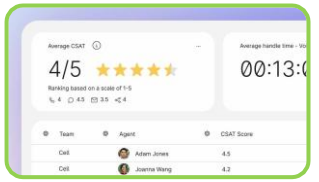
Real time transcription



Consult/Transfer Summary



Wrap up summaries & wrap up codes



Auto CSAT (voice)

Pre-call	Greeting	Conversation	During call	Post-call work	Post-call analytics

Customers

Agents

Admins/ Supervisors

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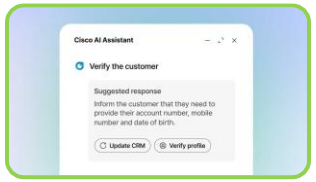
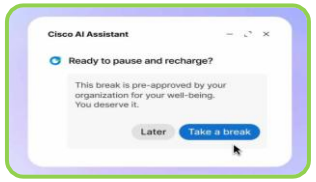
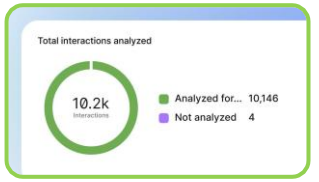
AI Assistant Capabilities



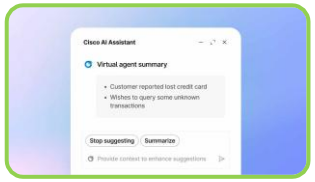
Suggested Responses



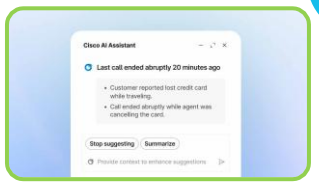
Agent Wellness Breaks



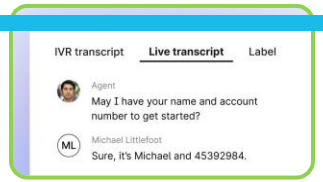
Topic Analytics



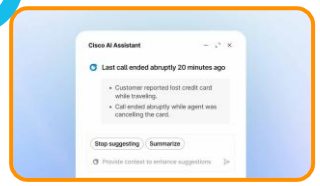
AI Agent context transfer summary



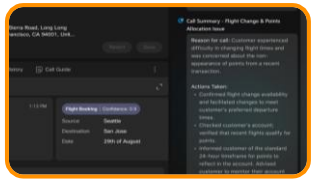
Dropped call summaries



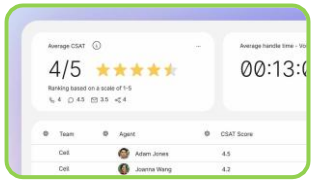
Real time transcription



Consult/Transfer Summary



Wrap up summaries & wrap up codes



Auto CSAT (voice)

Pre-call	Greeting	Conversation	During call	Post-call work	Post-call analytics

Customers

Agents

Admins/ Supervisors

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cisco

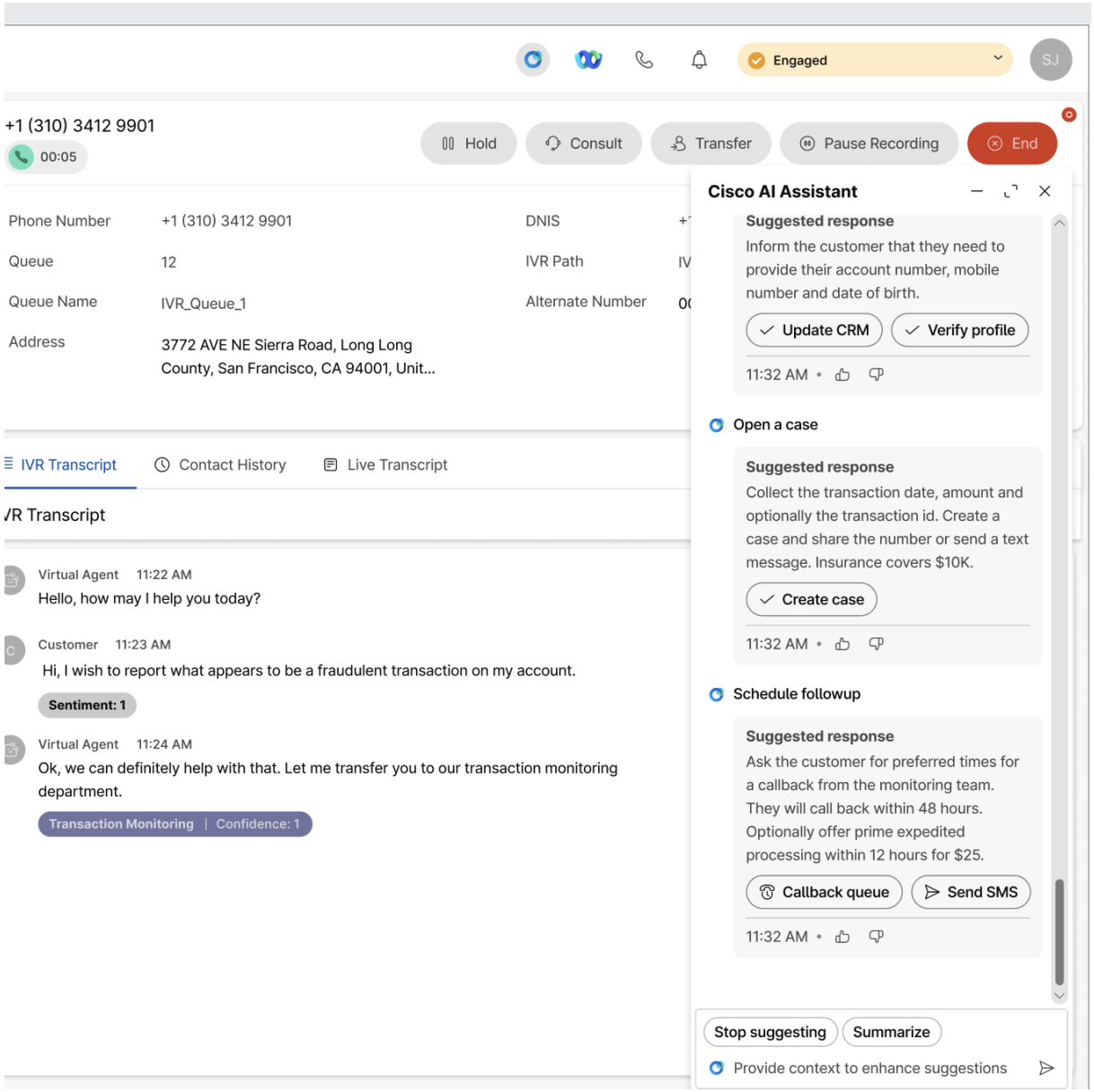
Suggested Responses

PROBLEM

- Agents struggle to find right info quickly
- Inconsistent responses to customer queries
- Manual actions slow down resolution

SOLUTION

- Assistant offers live coaching suggestions
- Triggers automated actions within workflows
- Ensures consistent, compliant responses



Shorter ramp-up time for new agents.

Improved customer-satisfaction

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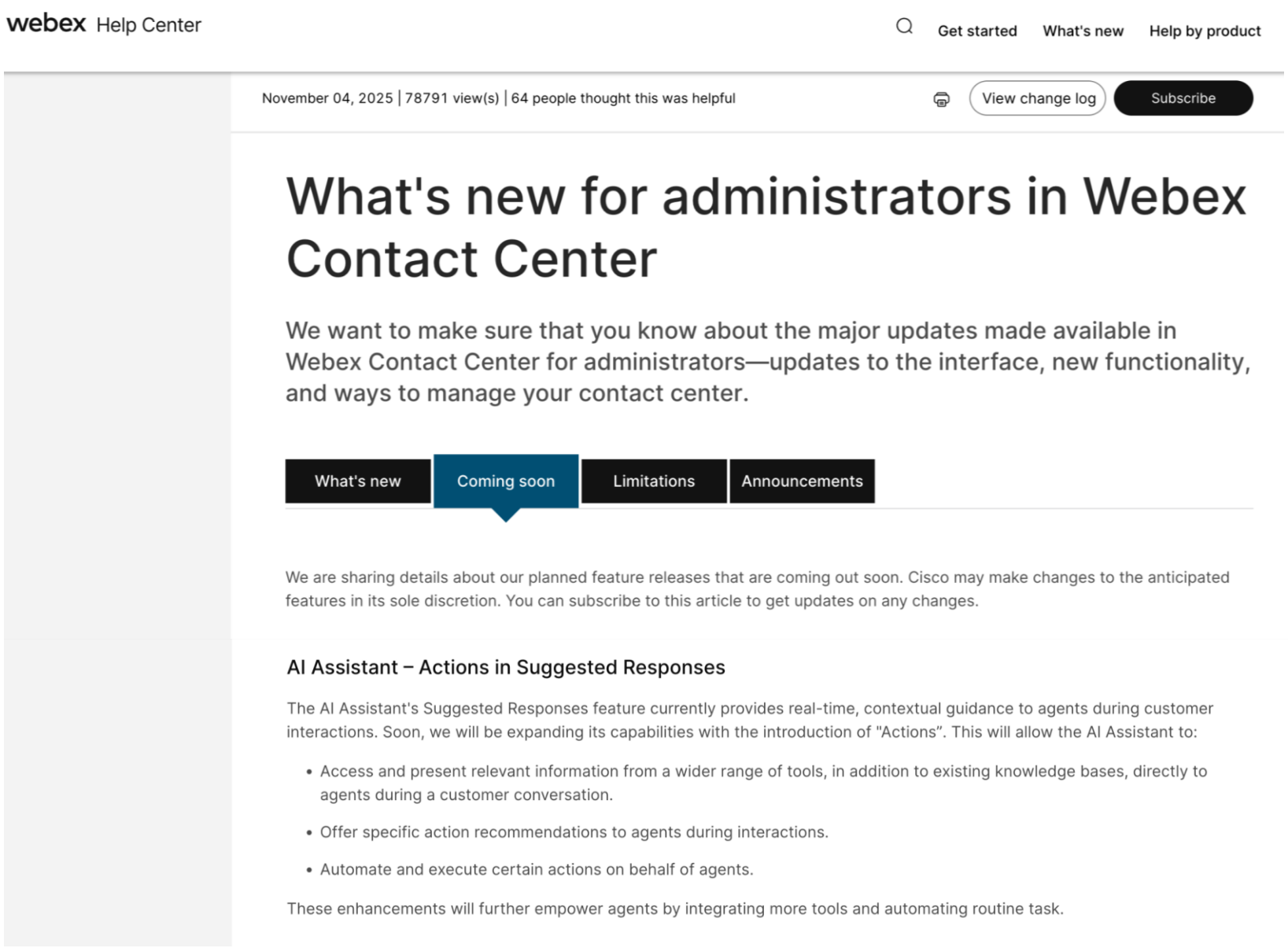
Making the Assistant work for your agents

Coming soon...

Keep yourself up to date with the pages on help.webex.com

What's new for Administrators in Webex Contact Center

Early Access in November



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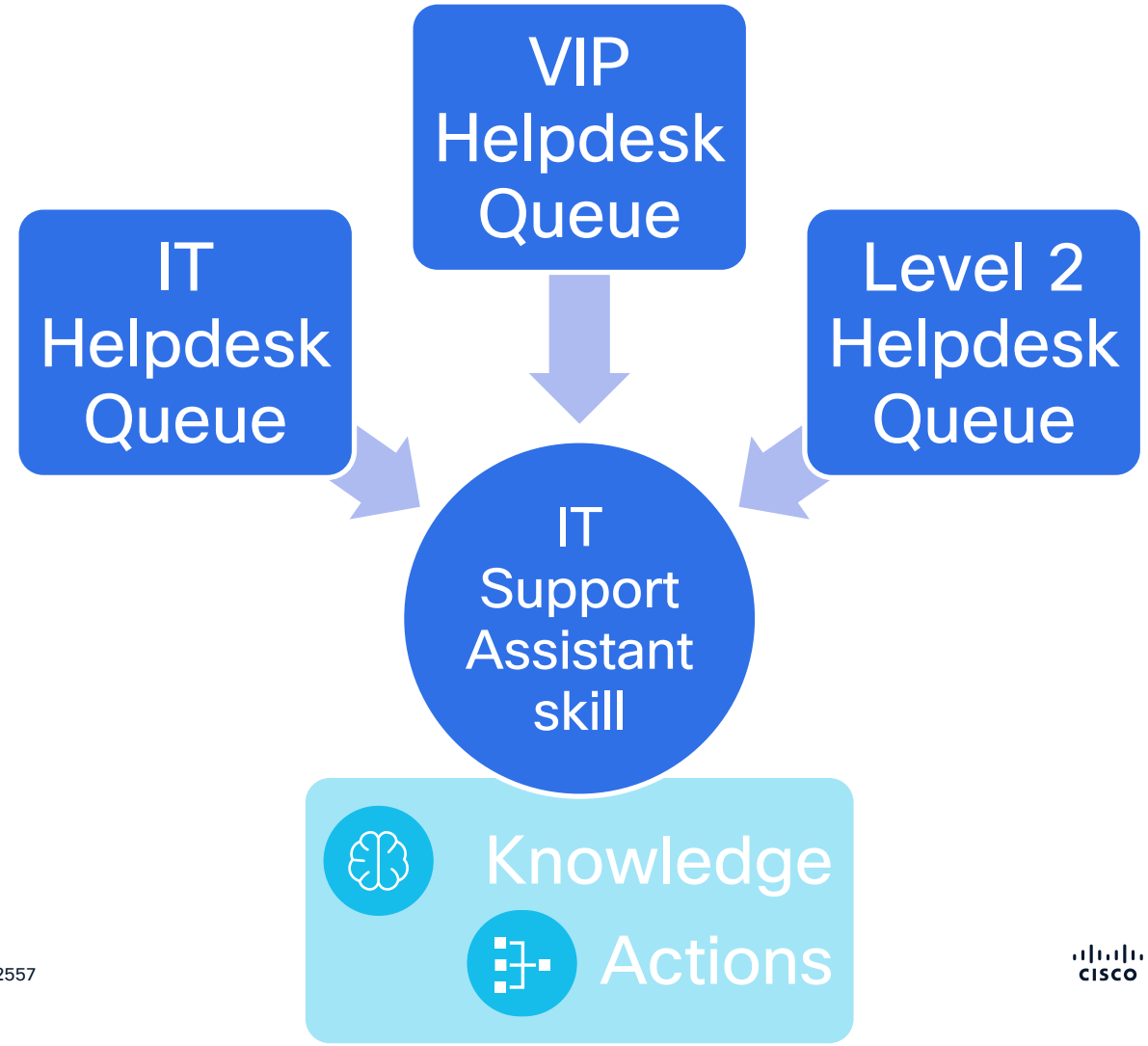
AI Assistant Skills

- An AI Assistant Skill is a knowledgebase and action set that provides answers and automation for human Agents
- Each Skill can be applied to multiple Queues.
- Each Queue can only have one Skill applied to it



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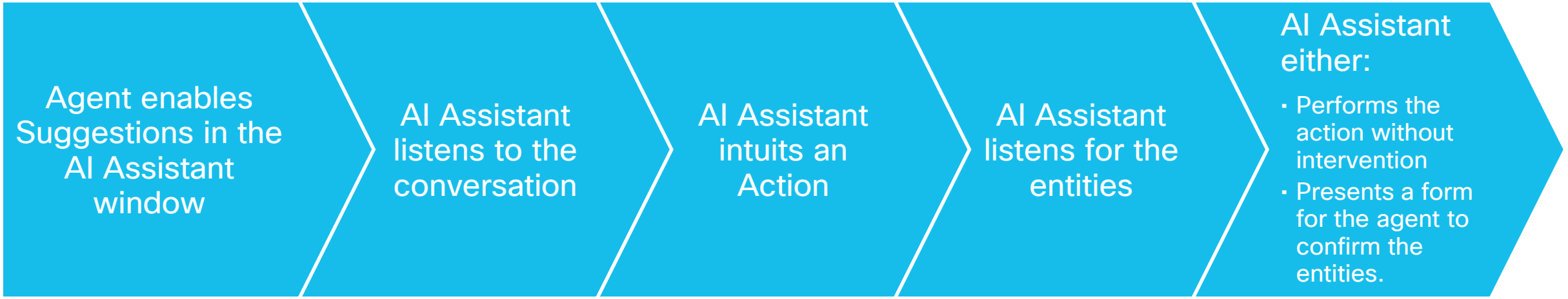
AI Assistant Actions



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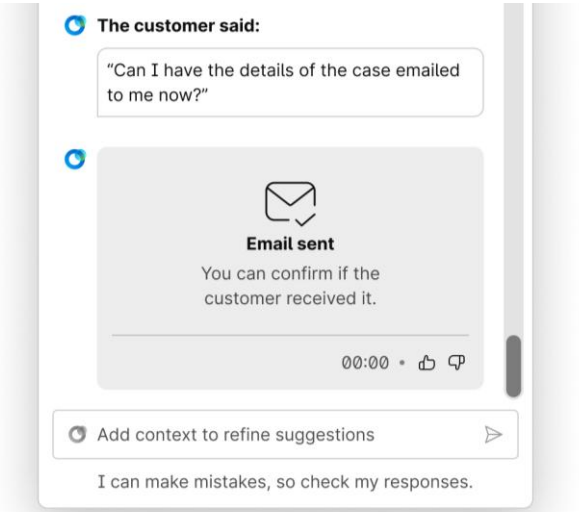
AI Assistant Actions

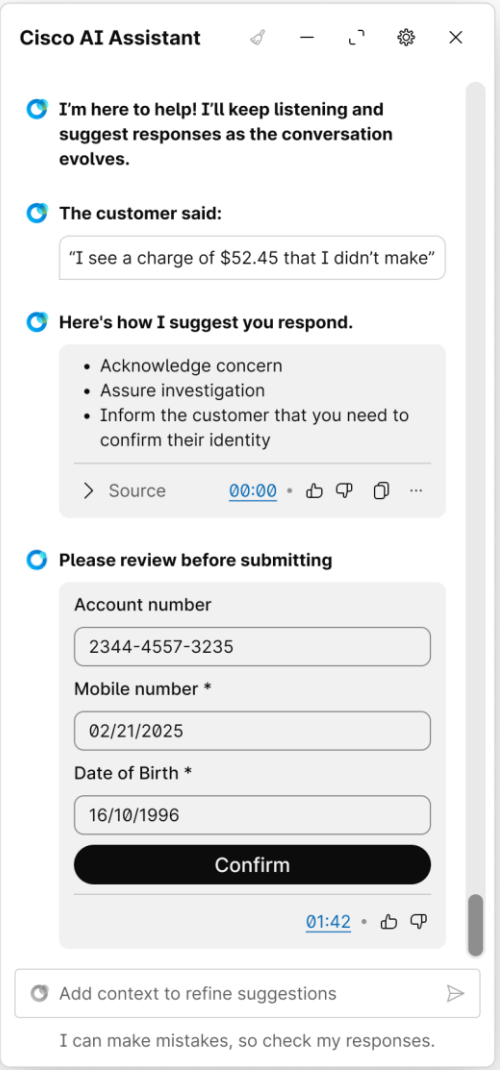
Unmoderated Actions

- AI Assistant can take simple actions without Agent intervention
- Useful for delivering email templates, call summaries, payment links



Moderated Actions

- For more complex automations, AI Assistant will present a confirmation box.
- Spoken entities are captured into the form element, agent can edit before triggering
- Useful for anything higher stakes – replacement cards, new requests



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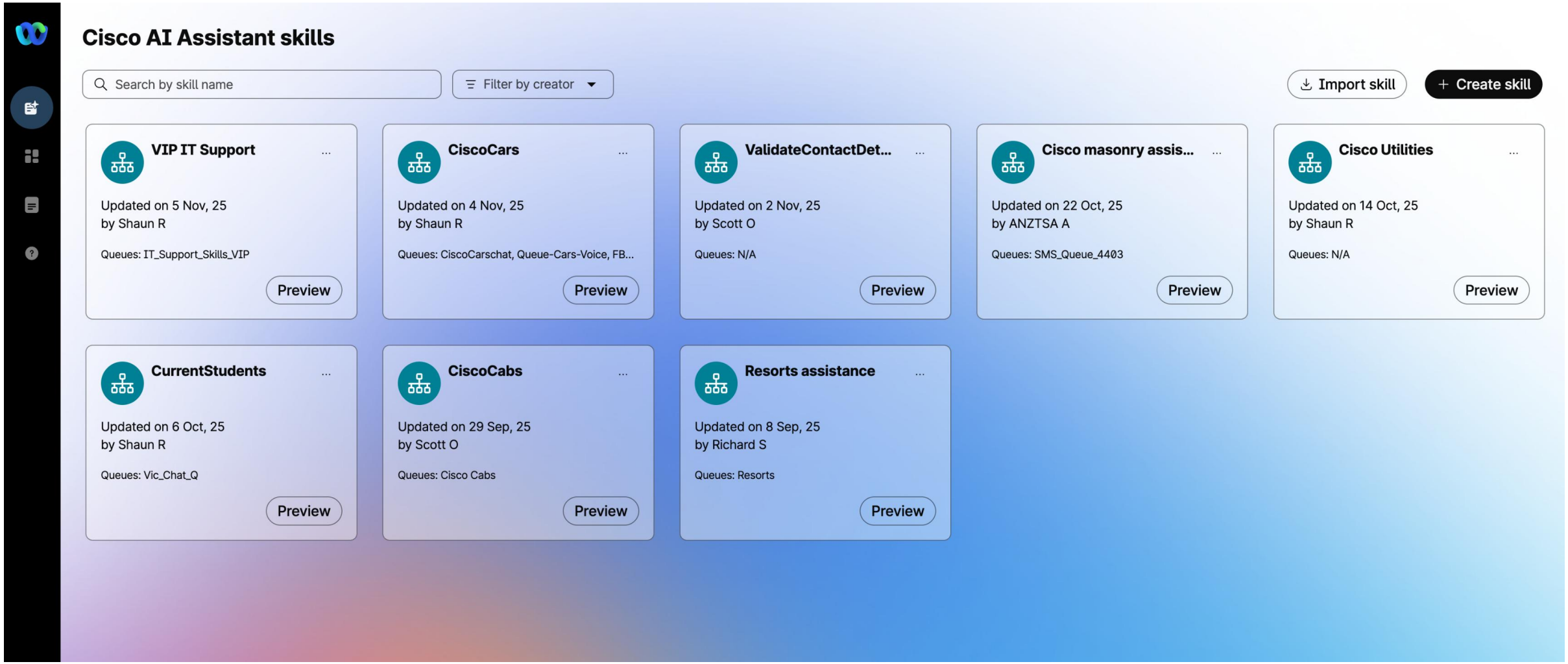
Configuring your AI Assistant Skills



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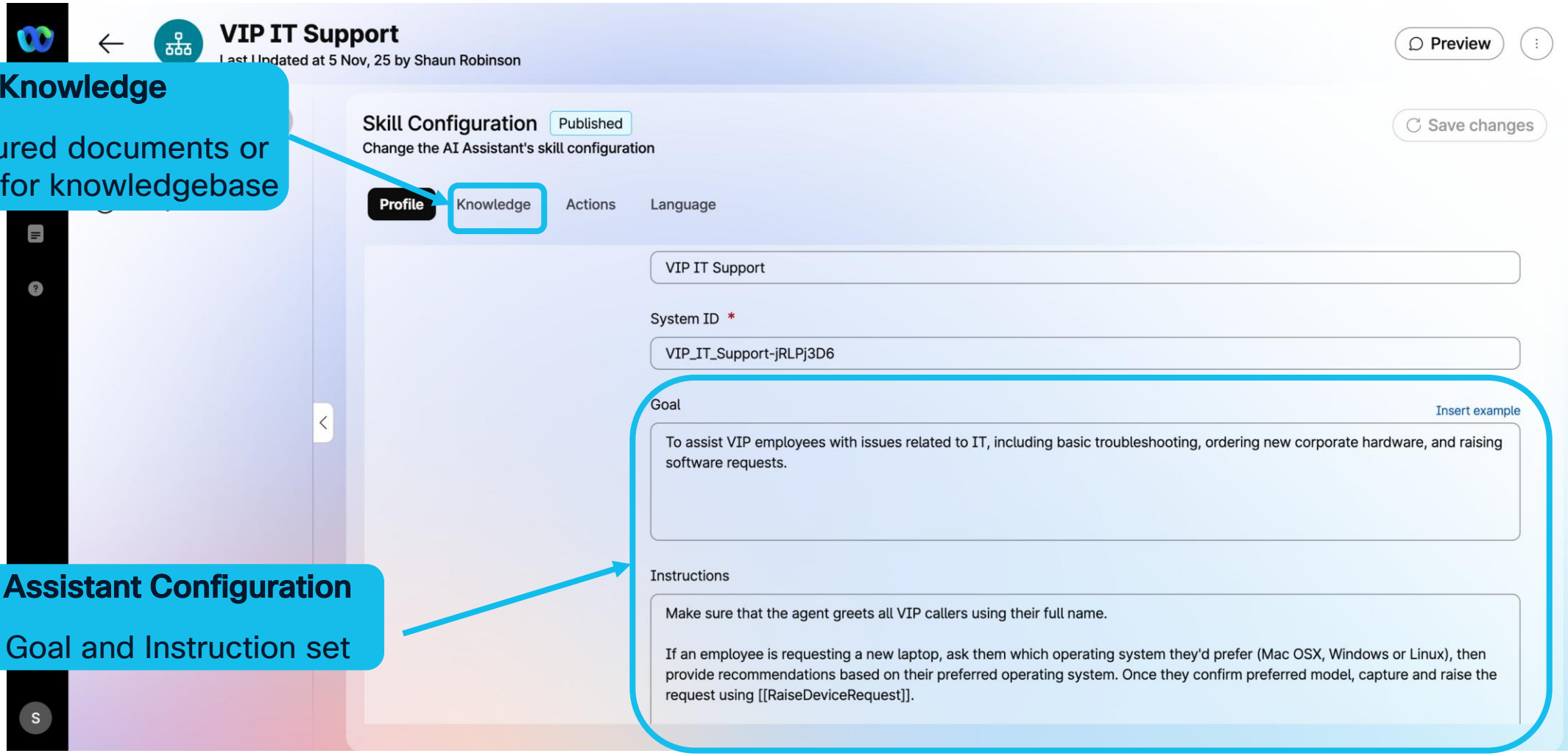
Configuring your AI Assistant Skills

Knowledge

Configured documents or articles for knowledgebase

Assistant Configuration

Goal and Instruction set



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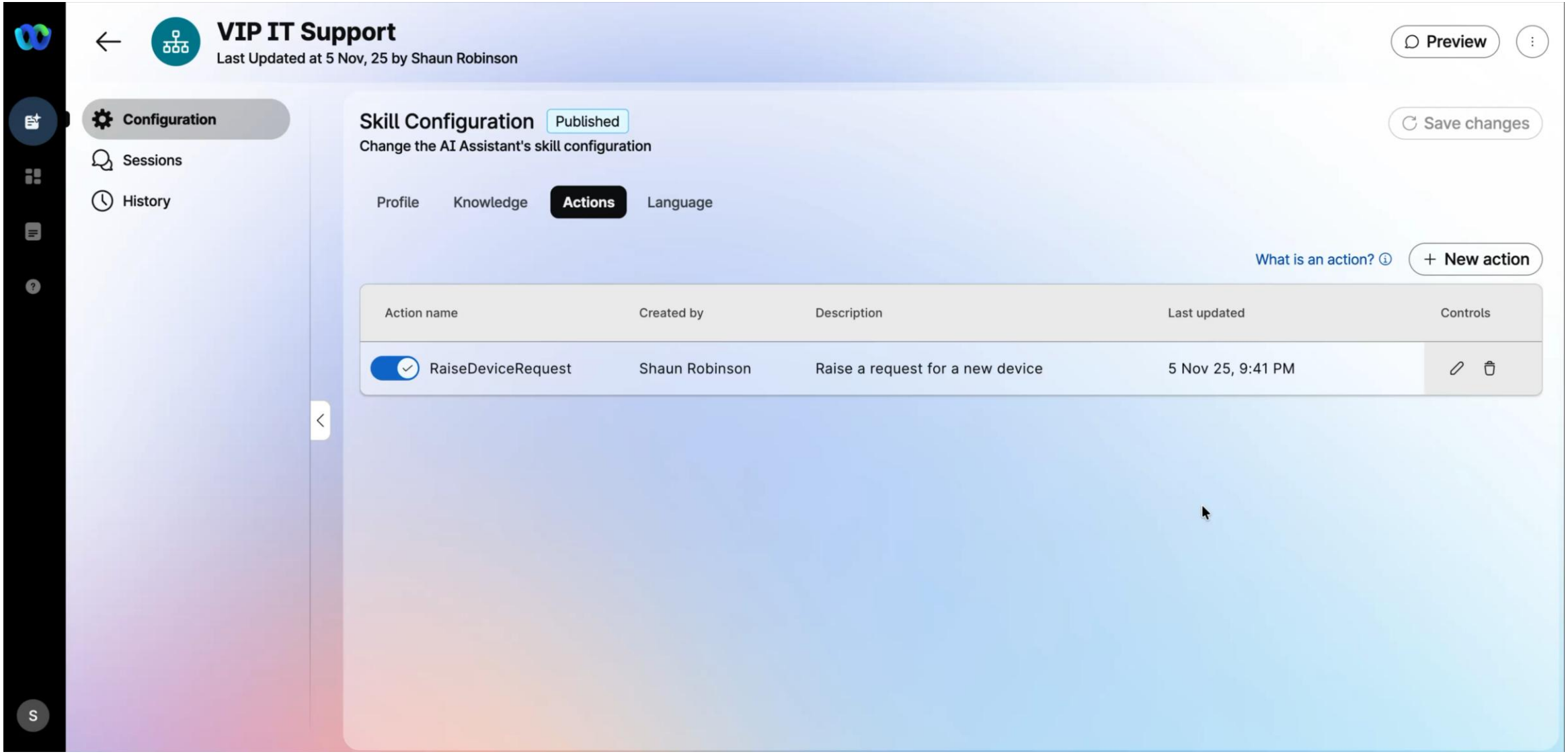
Configuring your AI Assistant Actions



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Examples of complete Actions

The three steps to an action

Trigger payload

Define the input that the AI Agent should collect

- Customer identifier
- Booking time/date
- IT Incident information

Connect Workflow

Perform the actions

- Get/Set information on an external system
- Send a notification on another channel (e.g. SMS)

Return Variables

Collate the information to return to the agent

- Case information
- Message confirmation
- One-time PIN code

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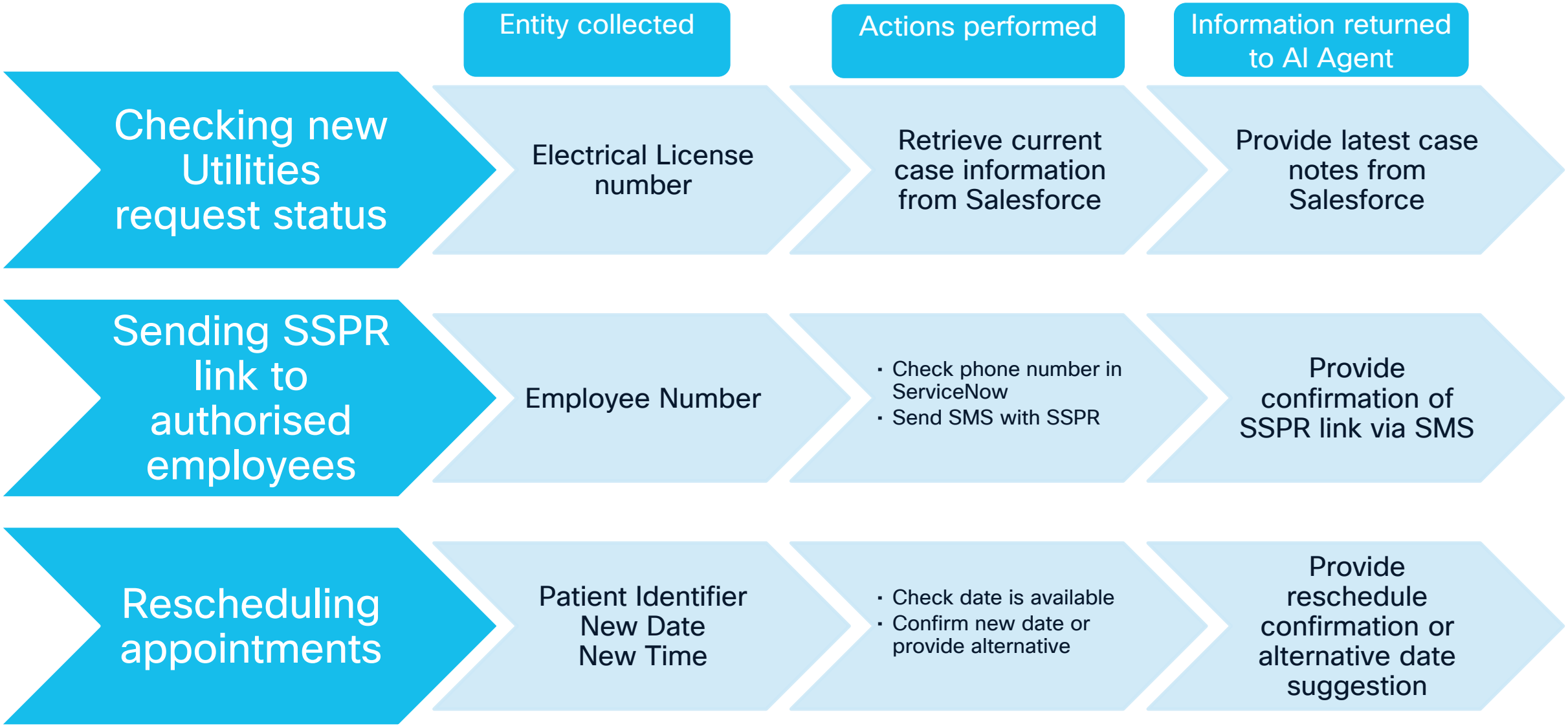
Action Examples



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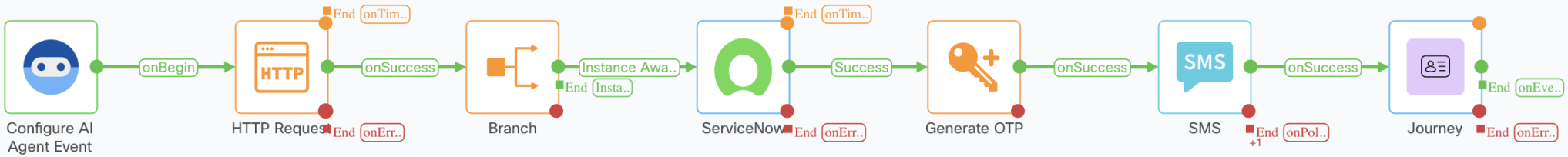
Bonus: One-Time PIN for basic ID&V before anything else

Validate user identity prior to starting conversation → Capture identifier → Lookup identity on system of record (e.g. ServiceNow) → Deliver OTP to SMS on record → Ask caller to confirm OTP

- Specific instruction:
  "- Before you answer anything from the user, use the [[IDV]] action to send a One Time PIN to the SMS we have on record for the person."
- Action in AI Studio captures Employee ID
- Connect Flow:



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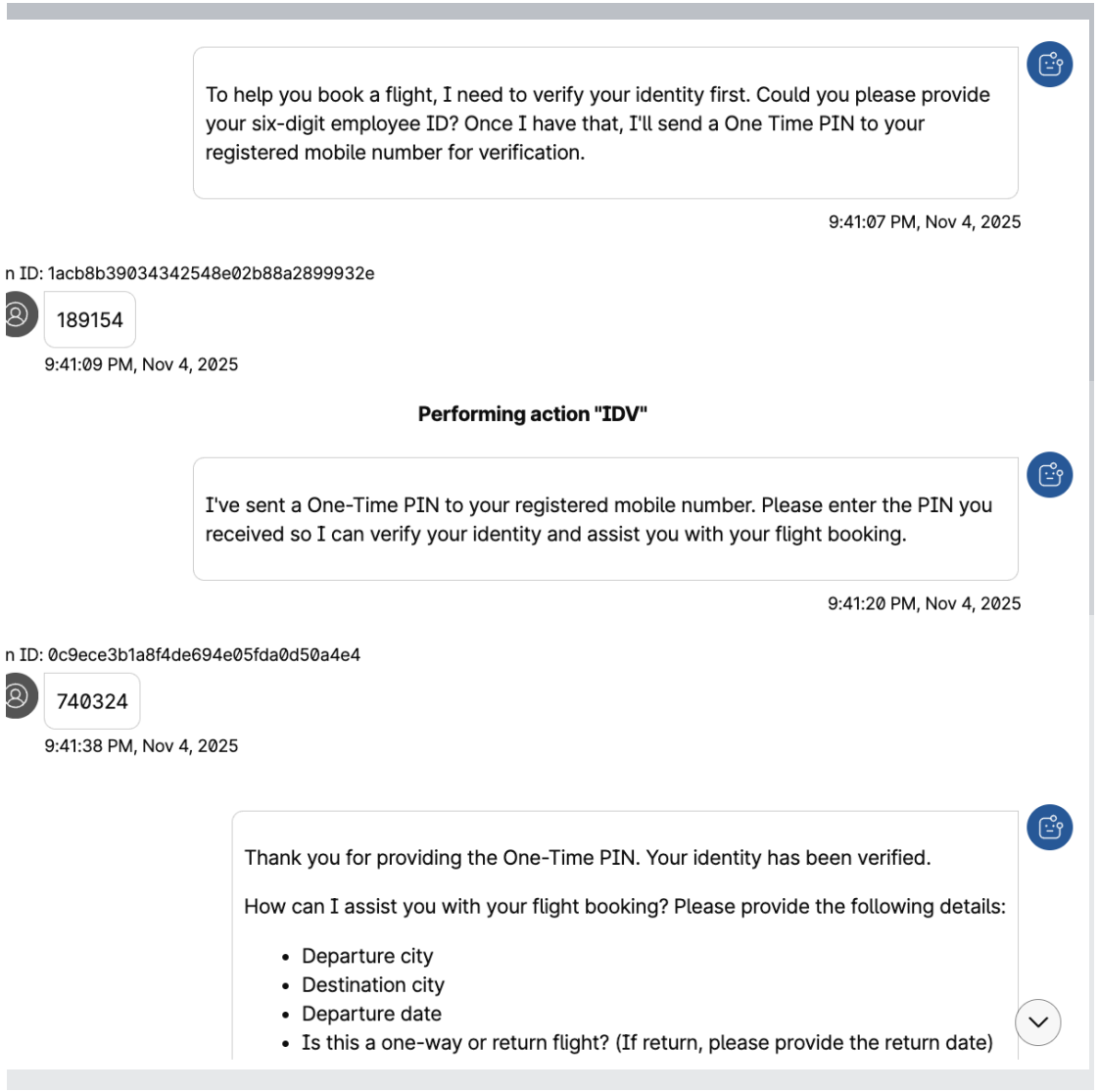
Here’s the One-Time PIN in action



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Best Practices for AI Actions

To ensure successful and robust AI Actions, consider these best practices:

Guardrails

Ensure that your AI Agents have well-defined guardrails specific to your organisation. While the product has native guardrails for common taboo/illegal subjects, there may be topics that always require a human touch.

Error handling

When configuring the Action flows, ensure that appropriate error handling is in place on all nodes. You can extend this by adding a Custom Variable for errors to tell the AI Agent what went wrong.

Journey Data Service

It's free with the product, and can provide a handy breadcrumb trail for human agents on what's been performed, and in the future will provide extra context for AI Agents.

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What next?

AI Studio enhancements in 2026

- Actions shared amongst AI Agents
- Pre-built Action import
- Integration management within AI Studio
- MCP for modern tooling integration

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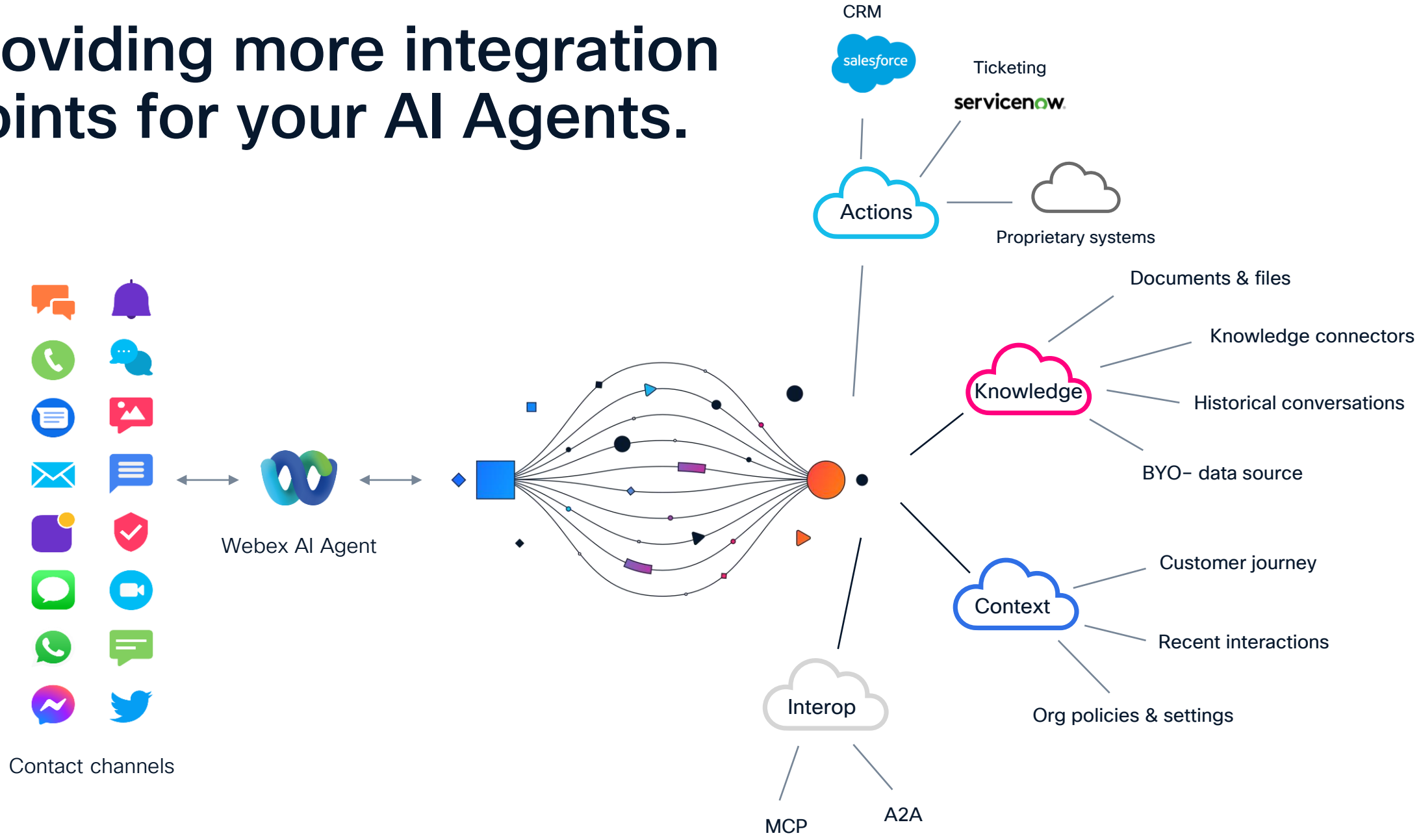
Providing more integration points for your AI Agents.



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Learning more about AI Agent and Assistant Actions

Attend the AI Lab on Thursday.

“Hands-on AI in action with Webex Contact Center”
LTRCCT-2000 at 10:15am to 11:45am in the World of Solutions

Test out the AI Agent sample templates
https://help.webex.com/en-us/article/n8mo4c/Use-AI-agent-templates

Review the best practices documentation
https://help.webex.com/en-us/article/nelkmxk/Guidelines-and-best-practices-for-automating-with-AI-agent
https://help.webex.com/en-us/article/powt52/Best-practices-for-optimizing-AI-Assistant-skills

Start thinking about your first automations

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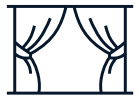

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Thank you

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