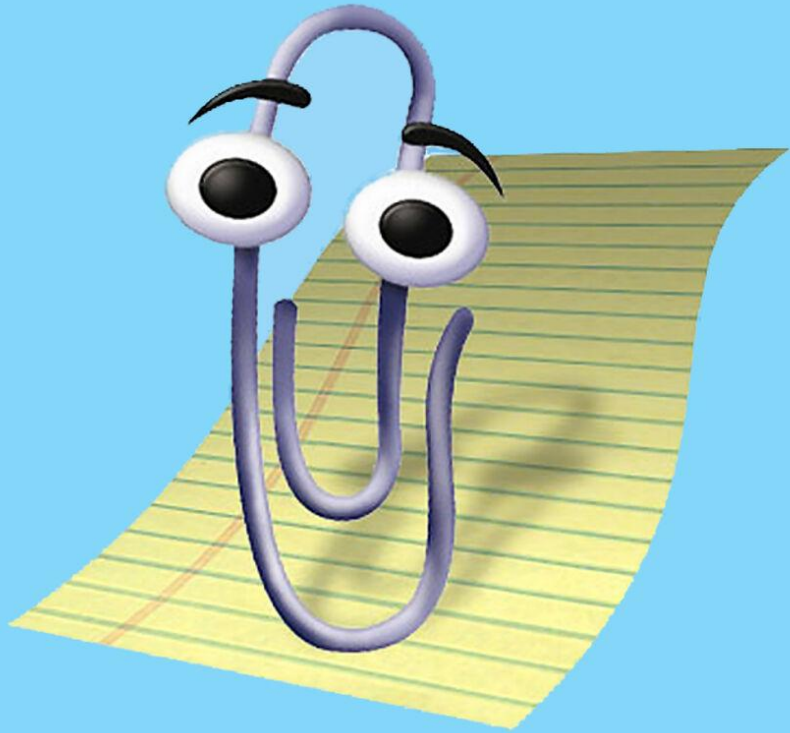


Implementing automation using AI Agent and AI Assistant Actions

CISCO Live !

Shaun Robinson
Solutions Engineer, Webex CX



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

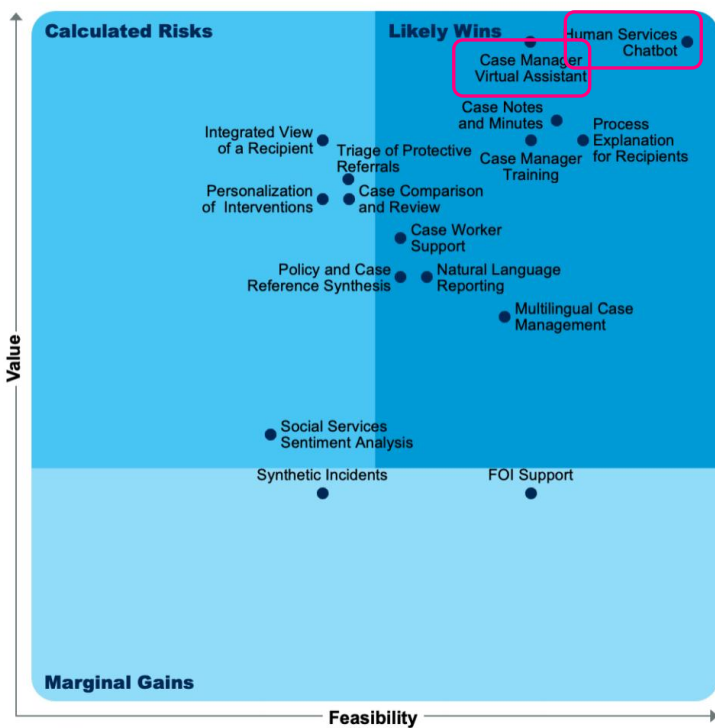
Virtual assistants are a likely win for a number of industries

Generative AI Use-Case Comparison for Banking



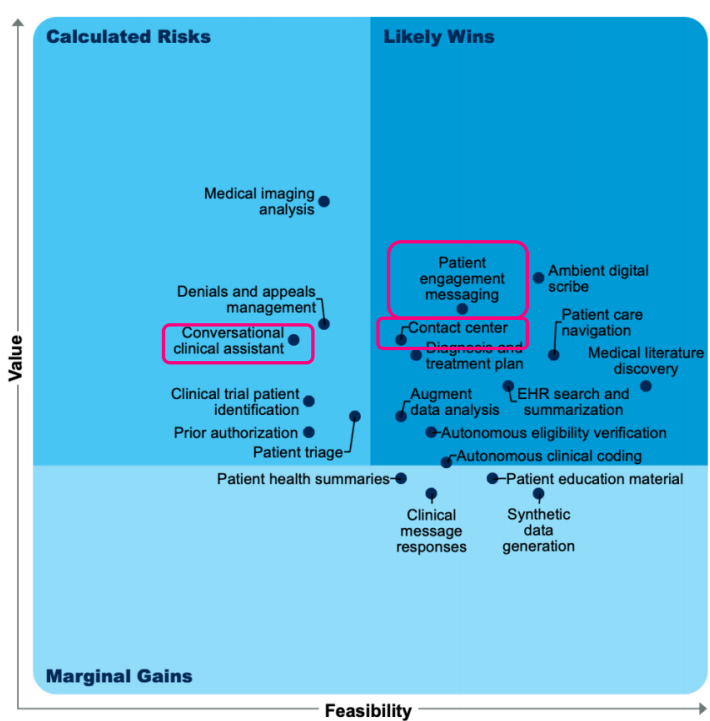
Source: Gartner
Note: AML = anti-money-laundering; KYC = know your customer; KYB = know your business
811955_C

GenAI Use Case Assessment for Human and Social Services



Source: Gartner
838818

GenAI Use-Case Assessment for Healthcare Providers

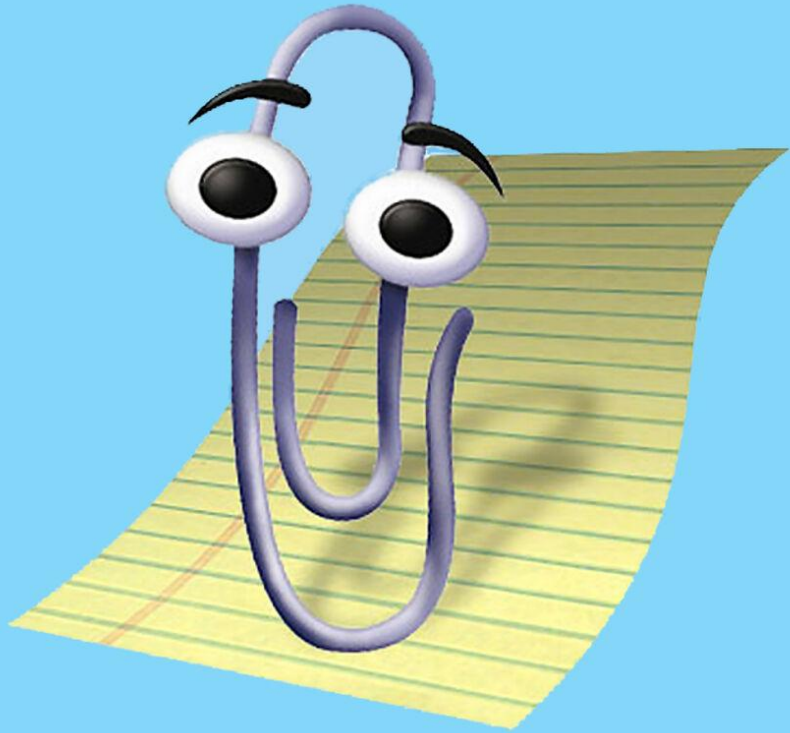


Source: Gartner
835071_C

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

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

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



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

Home Assistant(s)

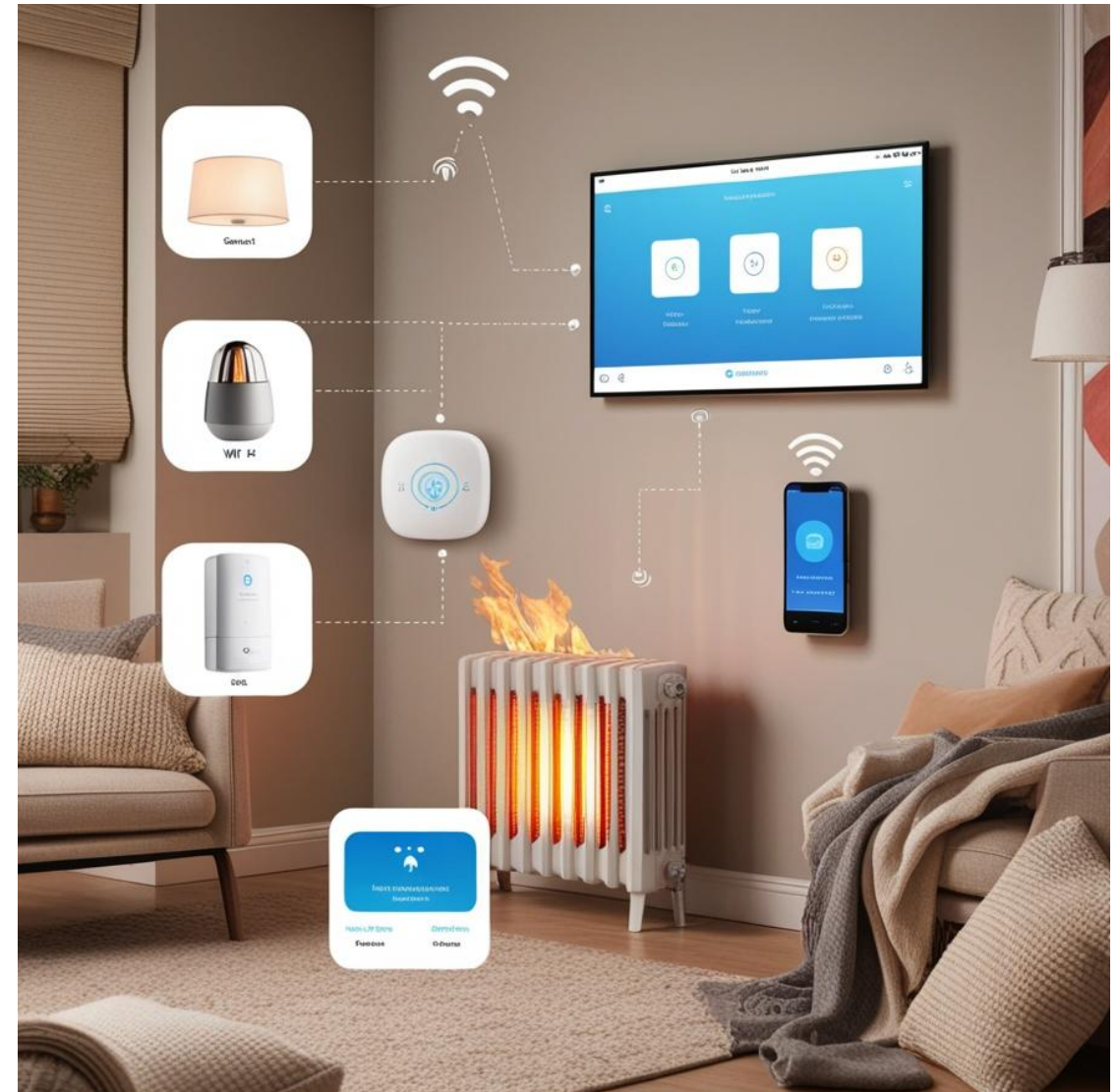


Domain knowledge, context aware, able to influence the world around it

**Rolling out automation can
make your life a lot easier**



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



**And this can go badly in
CX operations too.**

**Cost overruns, science
projects...**



And this can go badly in
CX operations too.

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



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



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

Cisco Webex App

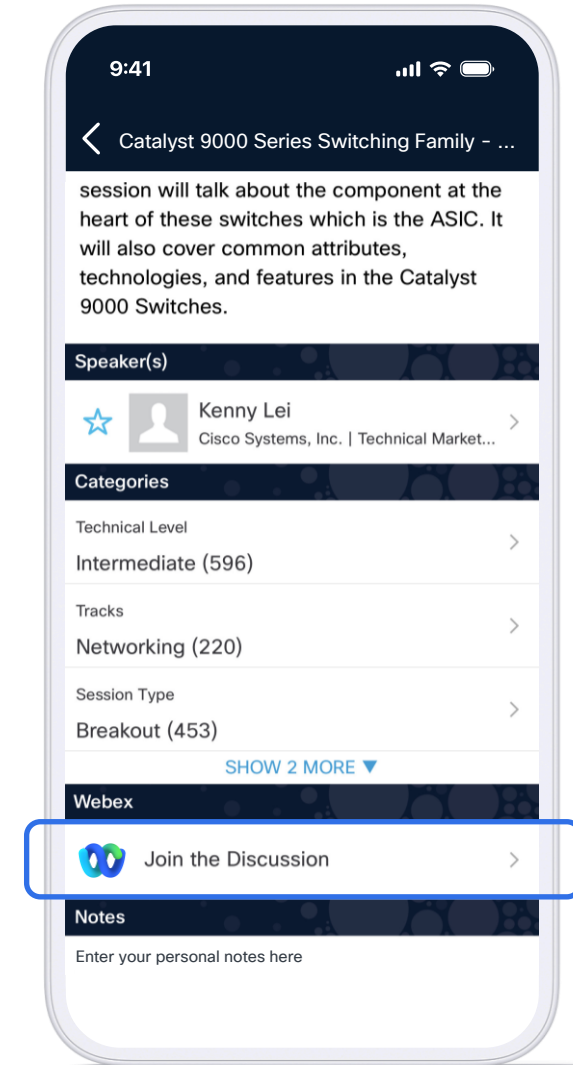
Questions?

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>

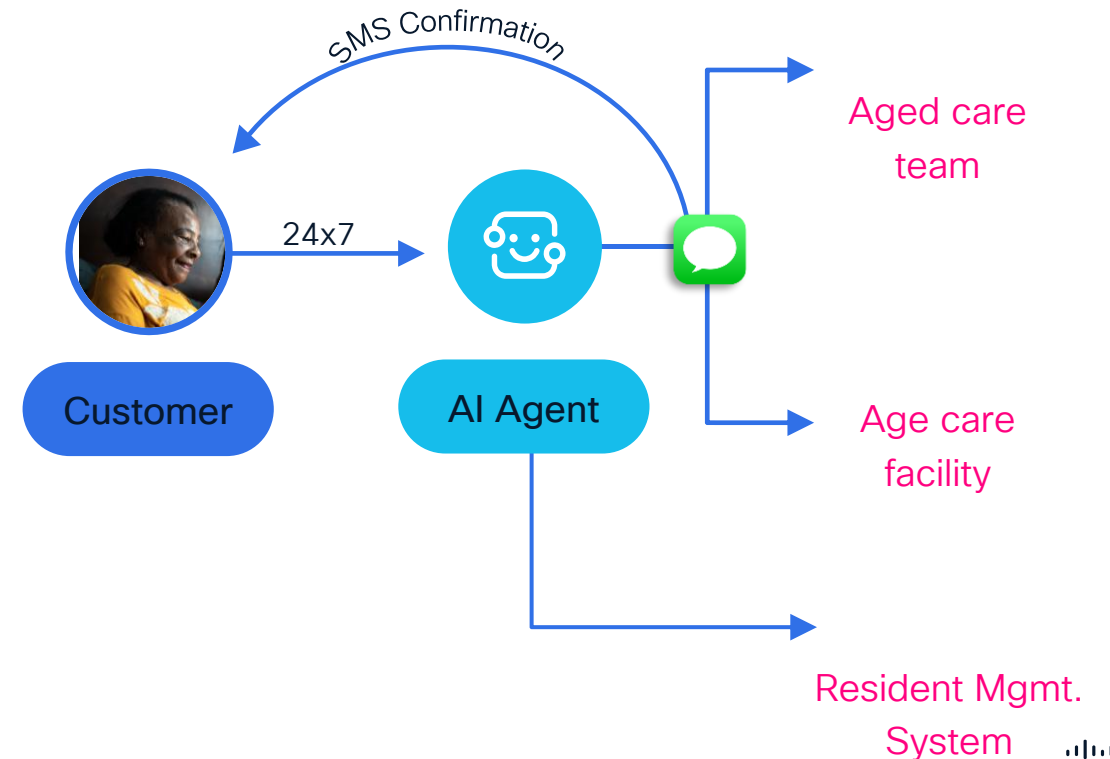
Why AI Agents?

Old vs new experience

Old experience



New experience



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

AI Transparency notes - available on TrustPortal

Model Details

Data Sources

Safety & Security

Privacy

Contents

<i>Feature Overview</i>	4
<i>Model Overview</i>	4
Introduction	4
Model Architecture	5
Usage Guidelines	5
Model Inputs and Outputs	5
<i>Data Sources for Training and Evaluation</i>	5
<i>Model Evaluation and Performance</i>	5
<i>Safety and Ethical Considerations</i>	6
<i>Fairness</i>	6
<i>Privacy and Security</i>	6
<i>Updates and Maintenance</i>	6
<i>References</i>	7

<https://trustportal.cisco.com/c/r/ctp/home.html>

AI Agent and AI Assistant



Seamless Experience

Customers receive immediate, accurate resolutions



Knowledge Access

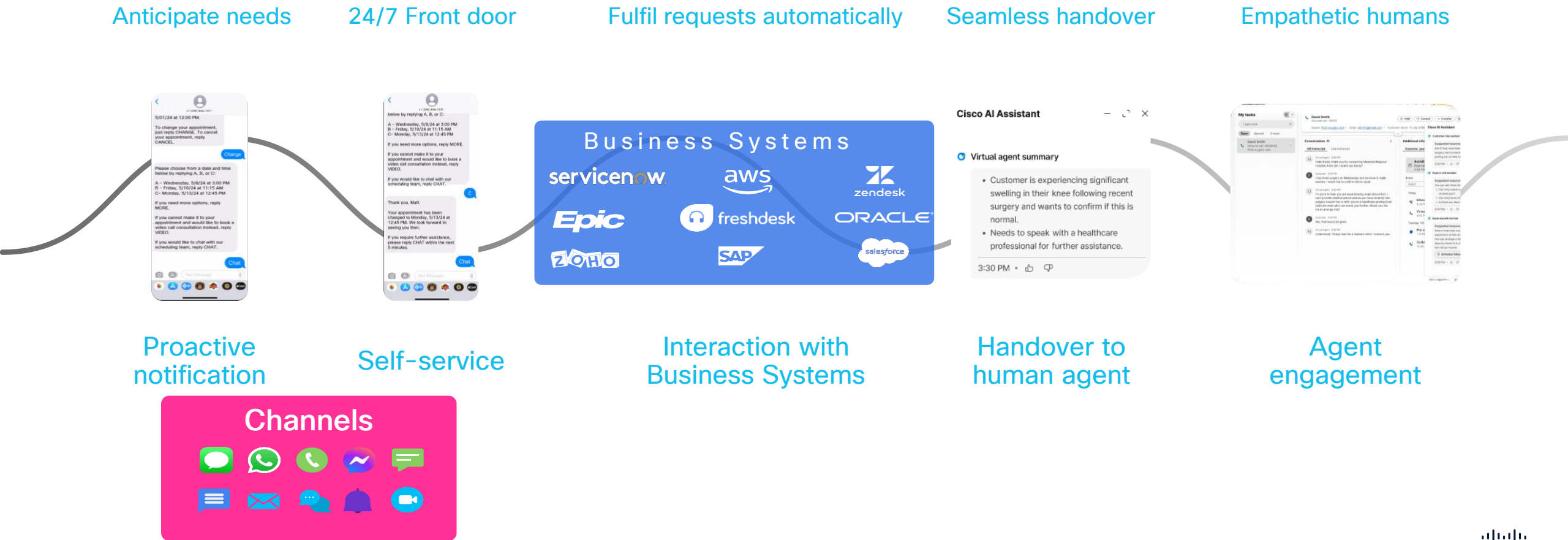
AI navigates knowledge sources to find answers



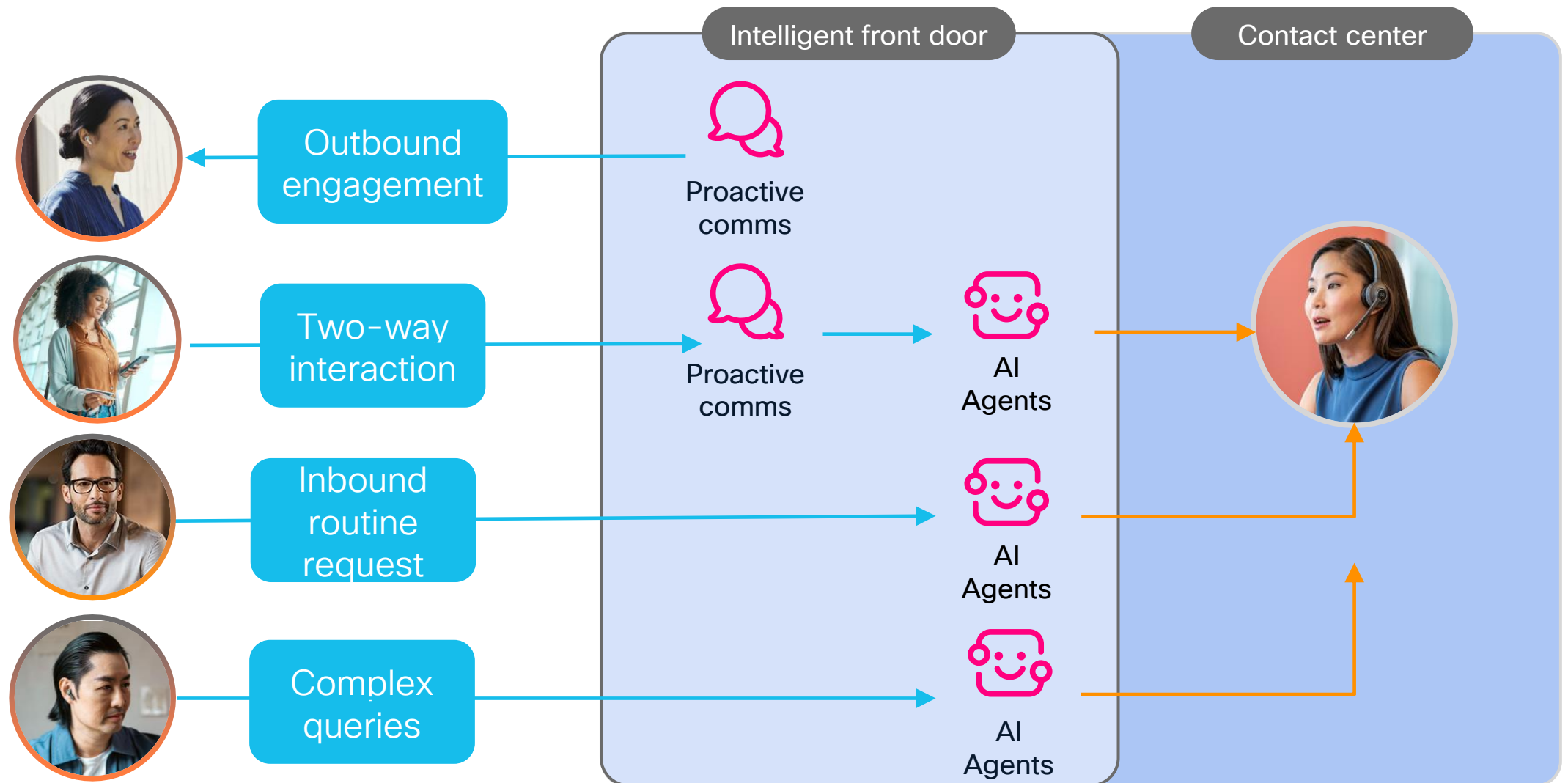
System Integration

AI performs actions across connected platforms

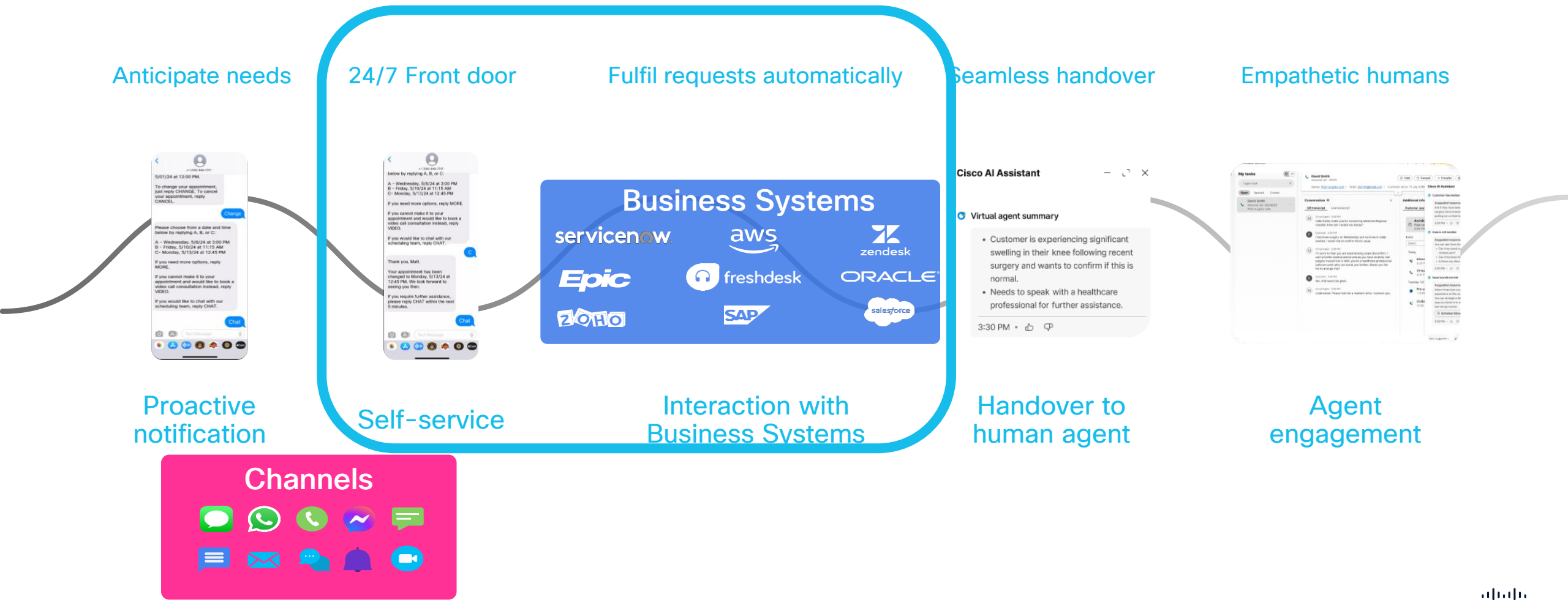
Delivering a frictionless customer journey



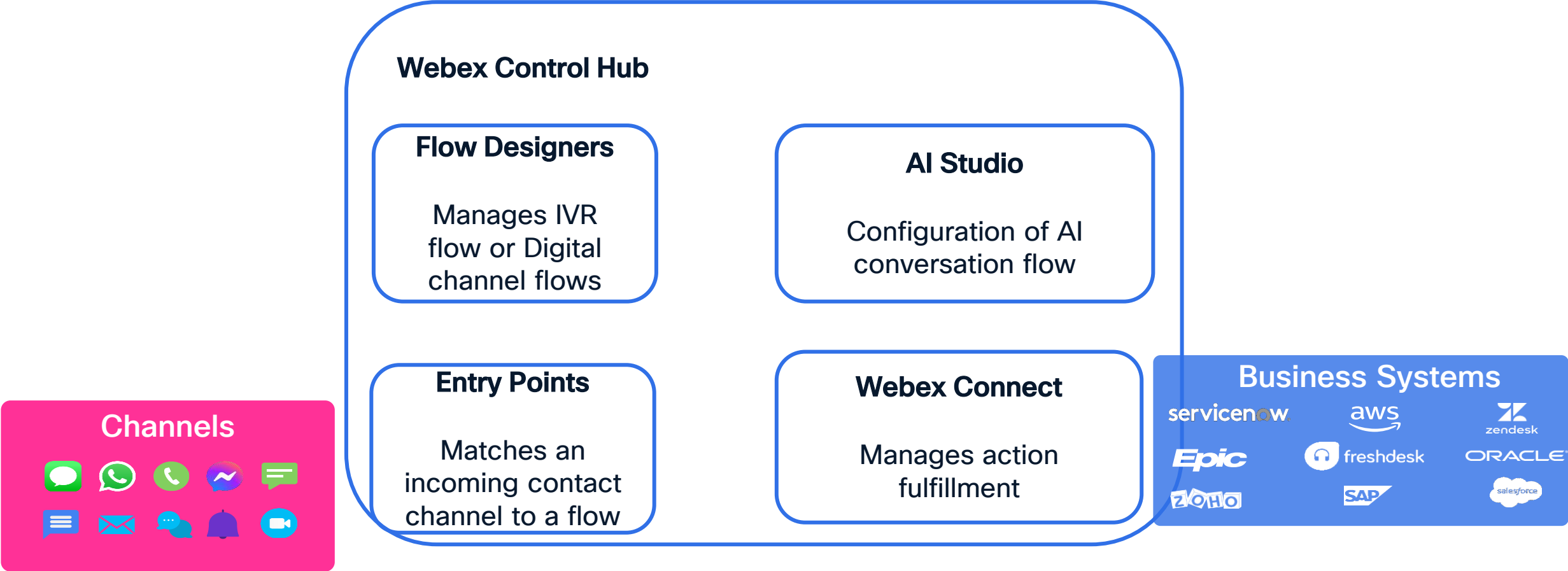
Examine the best starting point for automation



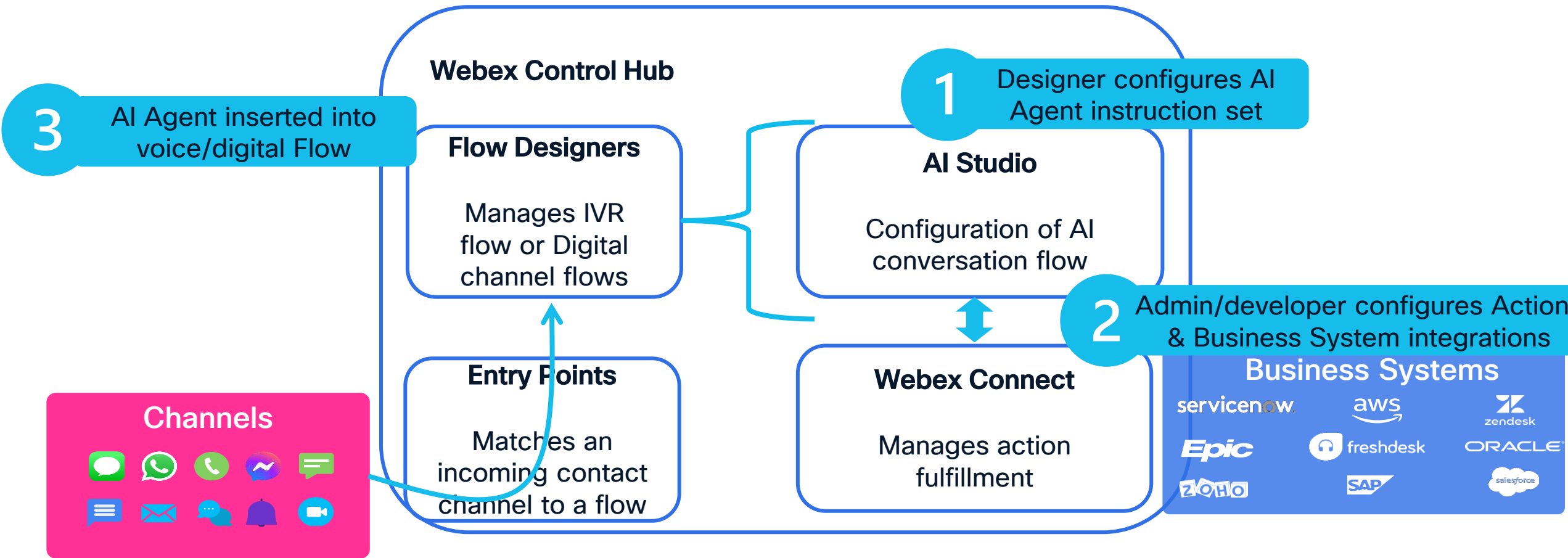
Let's focus on what we can solve in 90 minutes

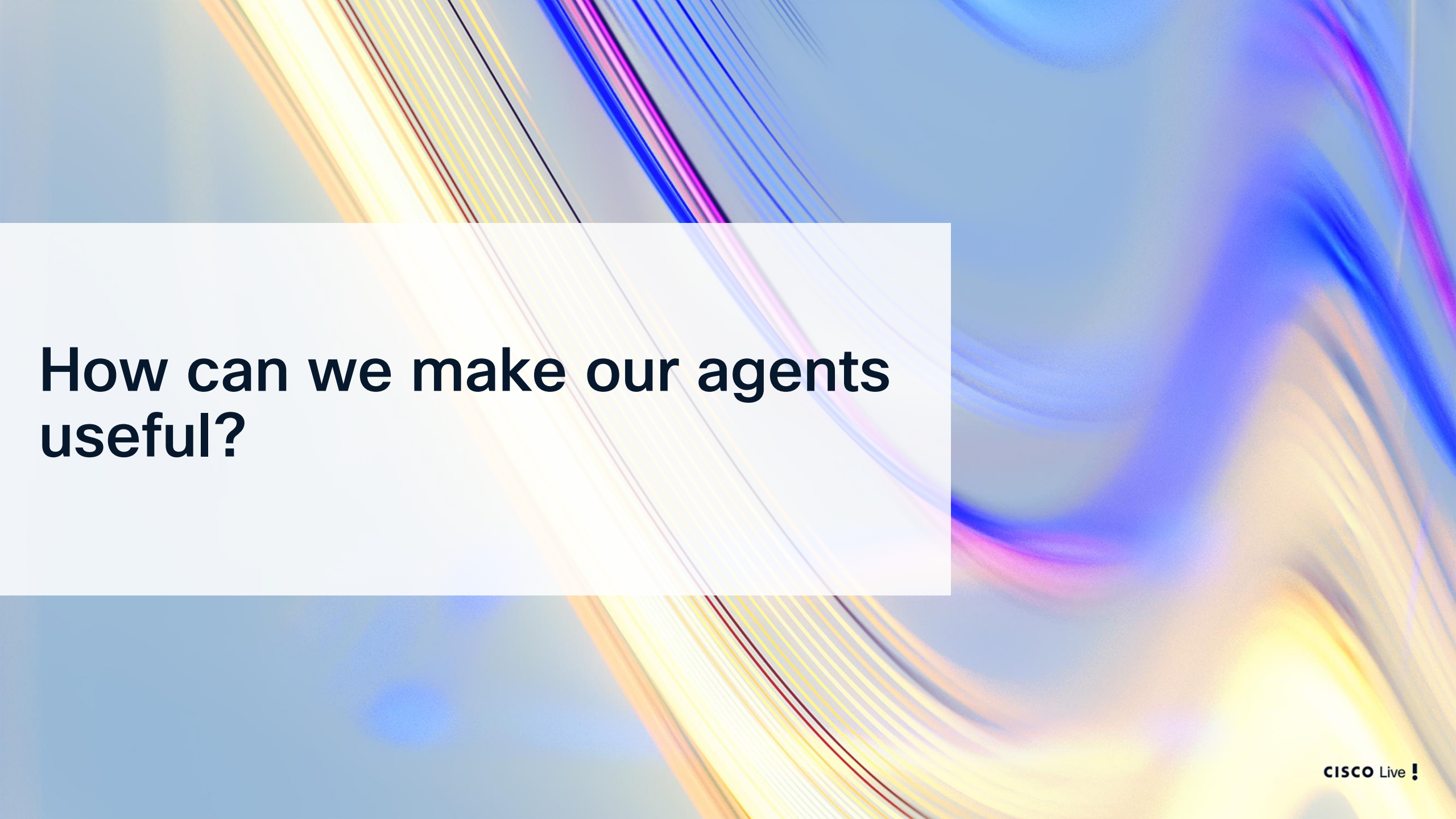


The touchpoints along our AI journey



The touchpoints along our AI journey





**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.



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

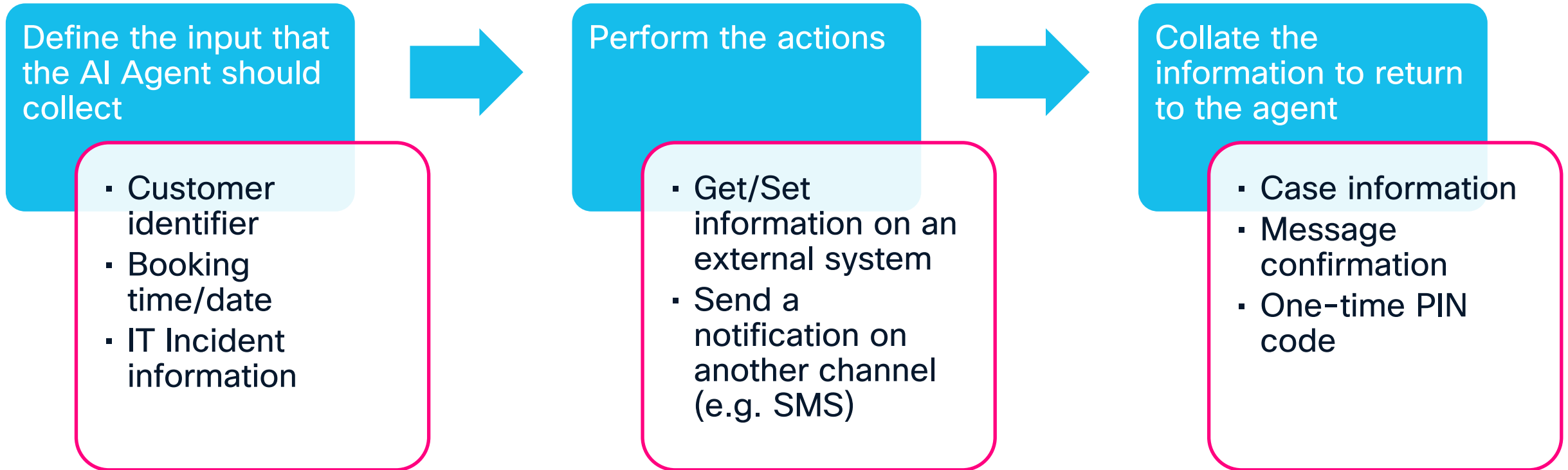
Deliver confirmations and alerts via SMS, email, or push notifications for appointments, one-time PINs, authentication requests, or new work items.



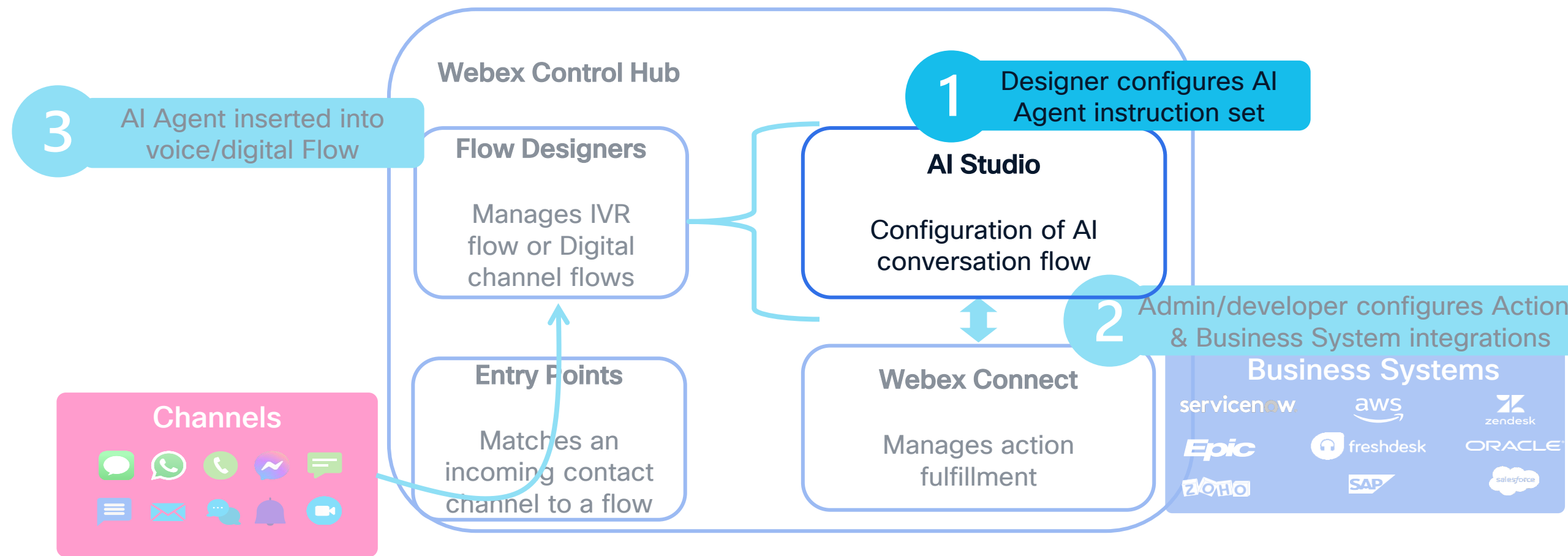
Raising requests

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.

The three steps to an action



AI Agent Studio



Accessing AI Agent Studio from within Control Hub

☰ webex Control Hub

AI-powered smart search

☰ webex Control Hub

AI-powered smart search

🌐 📧 🔔 ? 📄

SR

Customers

Users

Groups

Locations

Workspaces

Devices

Apps

Account

Security

Organisation settings

SERVICES

Updates & Migrations

Messaging

Meeting

Calling

PSTN & Routing

Customer Assist

Vidcast

Contact Centre

Events

Connected UC

Hybrid

Overview

< Main menu

Here's how to get the most out of Webex!

Meetings experience

Strengthen security

Provide a powerful meeting experience ⓘ

You'll see all engagement data here when your users start using Webex. After engagement, you'll also see data trends.

Goal

Promote human connection through video collaboration

Is this helpful? 👍 🗨️ ✎

Set-up guide

Start using Webex

Contact centre

Device carbon emissions ⓘ

38.7 kWh | 0 metric tonnes CO₂e

You can further reduce the energy consumption of your devices by enabling office hours. This will also extend the display's lifespan.

Contact Centre

Overview

CUSTOMER EXPERIENCE

Channels

Queues

Business Hours

Audio Files

Flows

AI Agents

Functions

Surveys

DIGITAL SETTINGS

Web Chat Assets

USER MANAGEMENT

Sites

Skill definitions

Skill profiles

Teams

Access

Updates

Update your services to the new Webex experience. [Learn more](#)

Update Webex Meetings to

Devices

21 Total devices

Online 1

Contact centre overview

Current cycle agent licence usage

Billing cycle: n/a

Agent licences

No licence data

Please contact the partner for more licence information.

View daily details

[Find out more about licence consumption](#)

What's new

Multimedia profiles

Create new and manage existing multimedia profiles.

Sites

Create new and manage the existing site. Associate your sites with multimedia profiles.

Teams

Create new and manage the existing team. Associate your teams with sites.

Skill profiles

Create new and manage existing skill profiles.

Desktop profiles

Create new and manage existing desktop profiles.

User profiles

Create new and manage existing user profiles.

Helpful resources

[What's new in Webex Contact Centre?](#)

[Agent desktop user guide](#)

[Supervisor desktop user guide](#)

[Analyser desktop user guide](#)

[Flow designer guide](#)

[Google CCAI Guide](#)

Quick Links

Contact Centre Suite

[Desktop](#)

[Create new flow](#)

[Webex Contact Centre Management Portal](#)

[Topic analytics](#)

[Webex AI Agent](#)

Digital channels

[Webex Connect ⓘ](#)

[Webex Engage](#)

[Manage proactive chats](#)

Get started

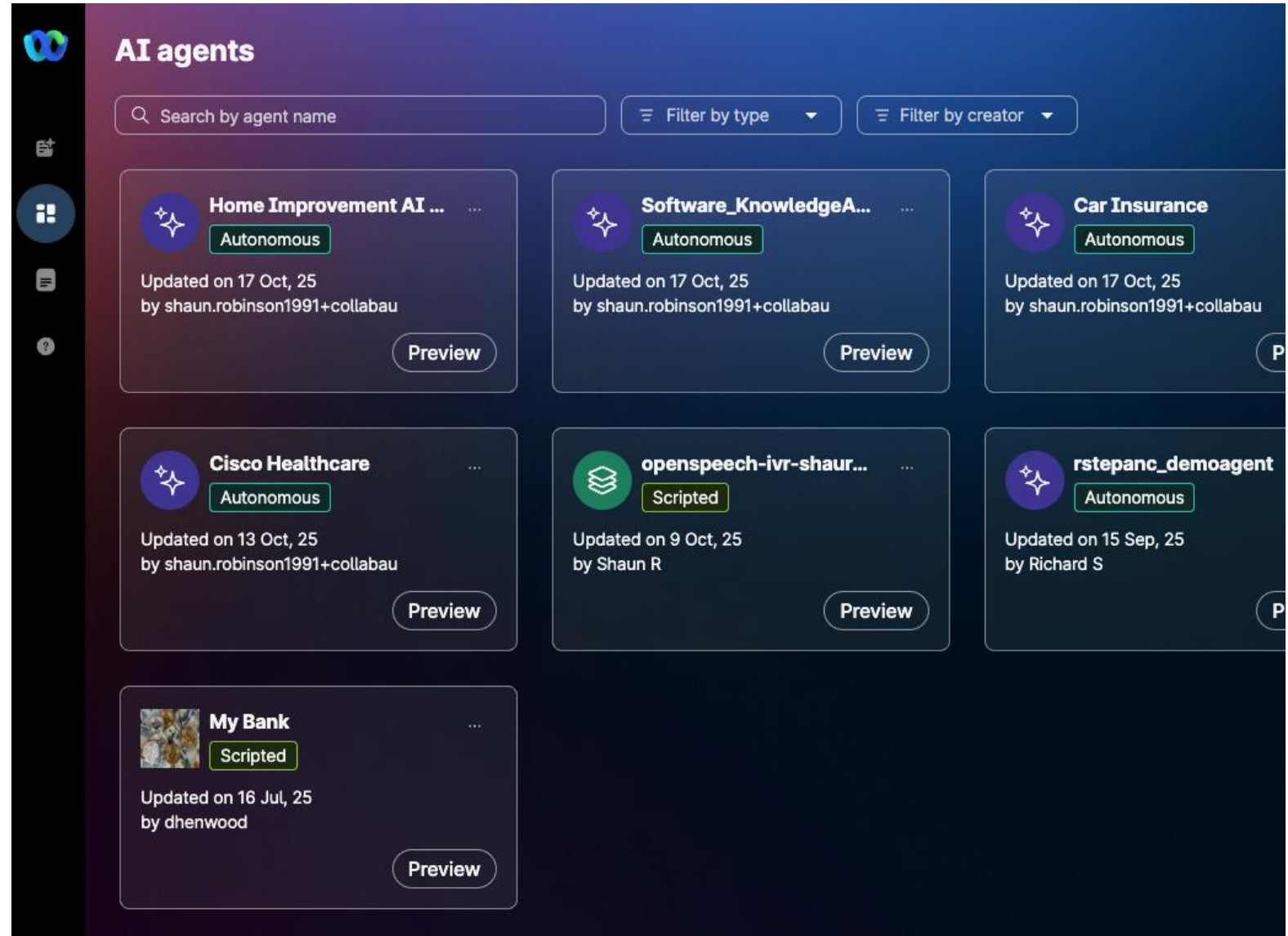
Resume



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.



Sample AI Agent configuration

Agent Goal

The resumé or “mission statement” for the Agent.

Welcome message

Instructions

Detailed guide on how to behave

The screenshot shows the 'AI agent configuration' interface with a sidebar on the left containing 'Configuration', 'Sessions', 'History', and 'Analytics'. The main panel is titled 'AI agent configuration' and has tabs for 'Profile', 'Knowledge', 'Actions', and 'Language'. The 'Profile' tab is active, showing fields for 'Agent name' (Cisco Healthcare), 'URL for agent profile image' (https://studio.aiagent-anz1.cisco.com/static/assets/img/bot-logo/default-virtualagent.svg), 'System ID' (Cisco_Healthcare-bMCooPoM), and 'AI engine' (Webex AI Pro 1.0). Below these fields are three sections: 'Goal and instruction tips', 'Agent's goal', 'Welcome message', and 'Instructions'. The 'Agent's goal' section contains the text: 'You are a friendly, polite agent that will assist patients with questions about upcoming appointments and surgery at Cisco Hospital.' The 'Welcome message' section contains the text: 'Hi there, how can I help you?'. The 'Instructions' section contains the text: '##Agent characteristics\n***Persona:** Helpful, informative, and efficient. Maintain a professional and courteous tone throughout the interaction.\n***Communication Style:** Use clear and concise language. Avoid jargon or technical terms the customer may not understand.\n***Empathy:** Show understanding and concern for the customer's situation, especially when they are experiencing issues or expressing frustration.\n***Speech Optimization:** Optimize the response for speech. Avoid Non-Speakable Elements: No code, markdown symbols, hyperlinks, or excessive numerical data without formatting it for speech-friendly output.'

Configuration

Sessions

History

Analytics

AI agent configuration

Published

Save changes

Add actions to connect your agent with external systems, or link a knowledge base to help it answer questions.

Profile Knowledge Actions Language

Goal and instruction tips

- Explain what the agent's purpose is.
- Break down the overall goal into specific, sequential steps and tasks.
- Reference the actions at each step that are used to fulfil each step and task
- Define the personality and expertise of the AI agent, e.g. friendly, formal, or casual.

Agent name *

Cisco Healthcare

URL for agent profile image *

https://studio.aiagent-anz1.cisco.com/static/assets/img/bot-logo/default-virtualagent.svg

System ID *

Cisco_Healthcare-bMCooPoM

AI engine *

Webex AI Pro 1.0

Ideal for most contact center use cases with global language support and human-like interactions.

Agent's goal * Insert example

You are a friendly, polite agent that will assist patients with questions about upcoming appointments and surgery at Cisco Hospital.

Welcome message *

Hi there, how can I help you?

Instructions Insert example

##Agent characteristics

***Persona:** Helpful, informative, and efficient. Maintain a professional and courteous tone throughout the interaction.

***Communication Style:** Use clear and concise language. Avoid jargon or technical terms the customer may not understand.

***Empathy:** Show understanding and concern for the customer's situation, especially when they are experiencing issues or expressing frustration.

***Speech Optimization:** Optimize the response for speech. Avoid Non-Speakable Elements: No code, markdown symbols, hyperlinks, or excessive numerical data without formatting it for speech-friendly output.

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.

The screenshot displays the 'Utilities' section of a Cisco AI Agent interface. The page title is 'Utilities' with a subtitle 'Last Updated at 5 Nov, 25 by Shaun Robinson'. A left sidebar contains navigation options: 'Configuration' (selected), 'Sessions', 'History', and 'Analytics'. The main content area is titled 'AI agent configuration' with a 'Published' status tag. Below the title is a description: 'Add actions to connect your agent with external systems, or link a knowledge base to help it answer questions.' There are four tabs: 'Profile', 'Knowledge' (selected), 'Actions', and 'Language'. Under the 'Knowledge' tab, there is a 'Knowledge base' section with a dropdown menu showing 'LoadShedding_PC'. A blue box highlights the 'Manage' button below the dropdown. A blue arrow points from the 'Knowledge' section header in the left sidebar to the 'Manage' button.

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.”

Guidance on the Agent Instructions

- The step-by-step instructions of what to 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:

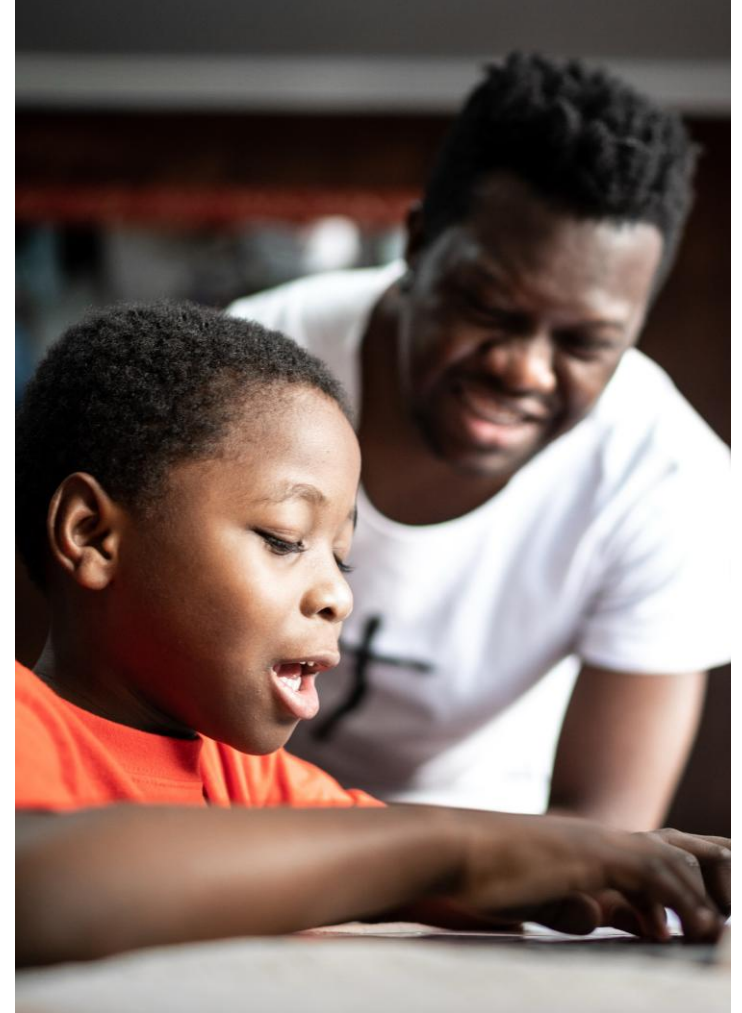
- When replying to a question, offer one step at a time. Do not provide multiple steps at a time. Keep your replies concise.

**** Use small words, avoid using acronyms, and assume that your users are not tech-savvy****

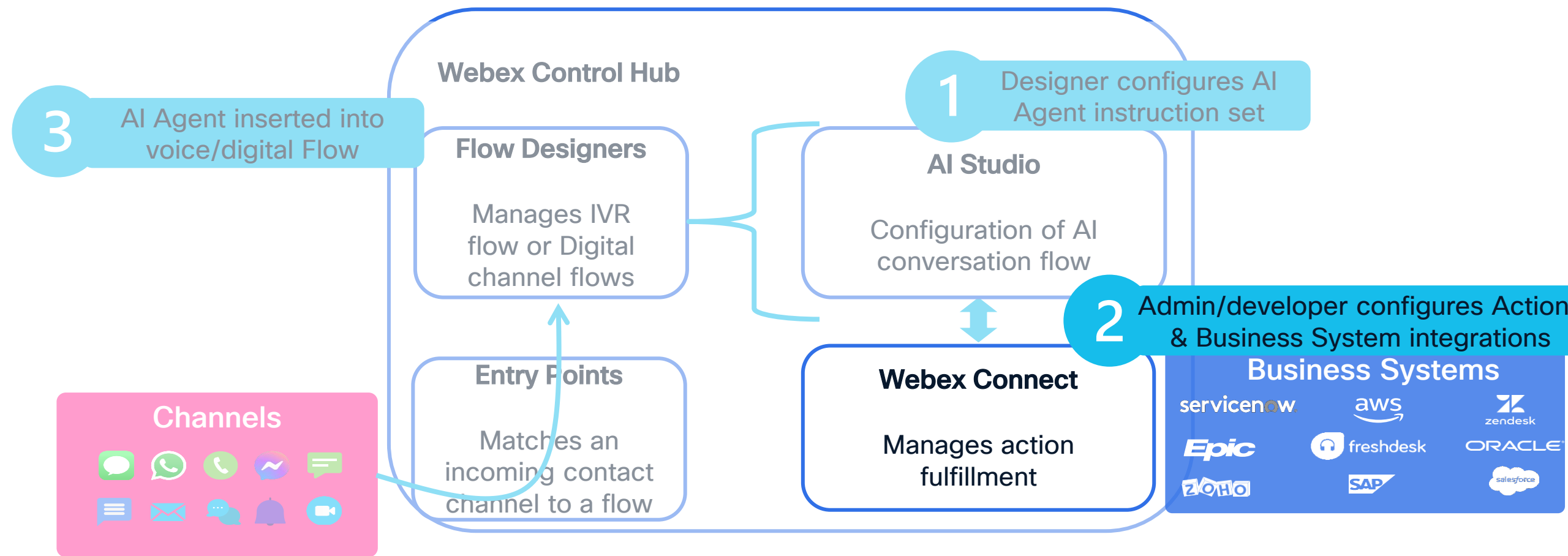
If they complain about poor speed, offer to send them a Realspeed test link via SMS using `[[Realspeed_link]]`. The results from this test will be provided to the agent when they accept the call.

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>



Connect's Flow Builder



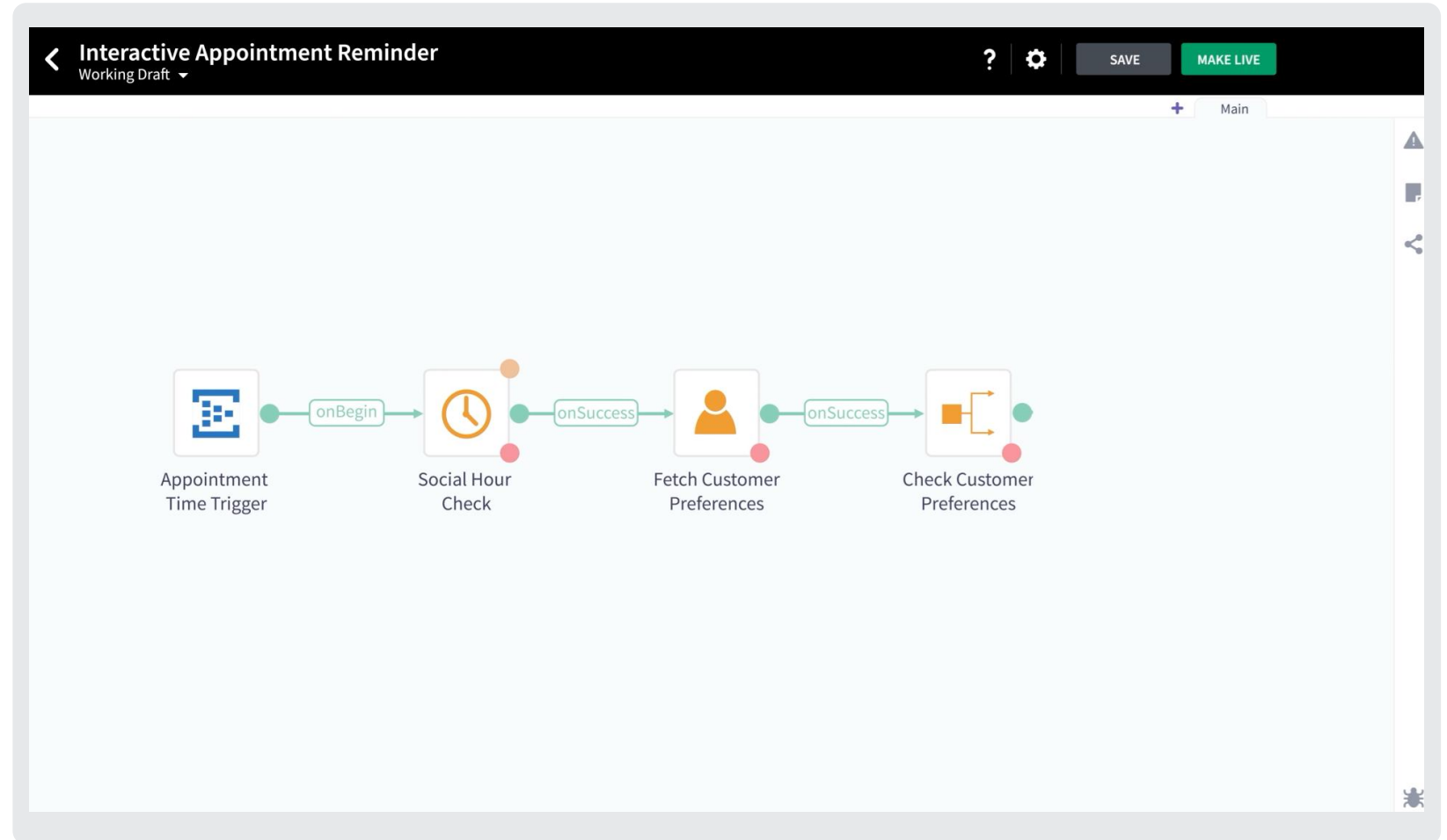
Webex Connect

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



Creating a new flow

Services - Shaurobi ANZ South

Sitemap

Shauns container

DashboardFlowsRulesAPI

SettingsCreate Flow

Flow Builder

Flow builder is a visual designer with a library of nodes that you can drag and drop to create and test interactive customer journeys with little to no code.

[Check out our guide to building flows here.](#)

If you've got more questions after reading through it, just ask. We're always here to help.

Create Flow

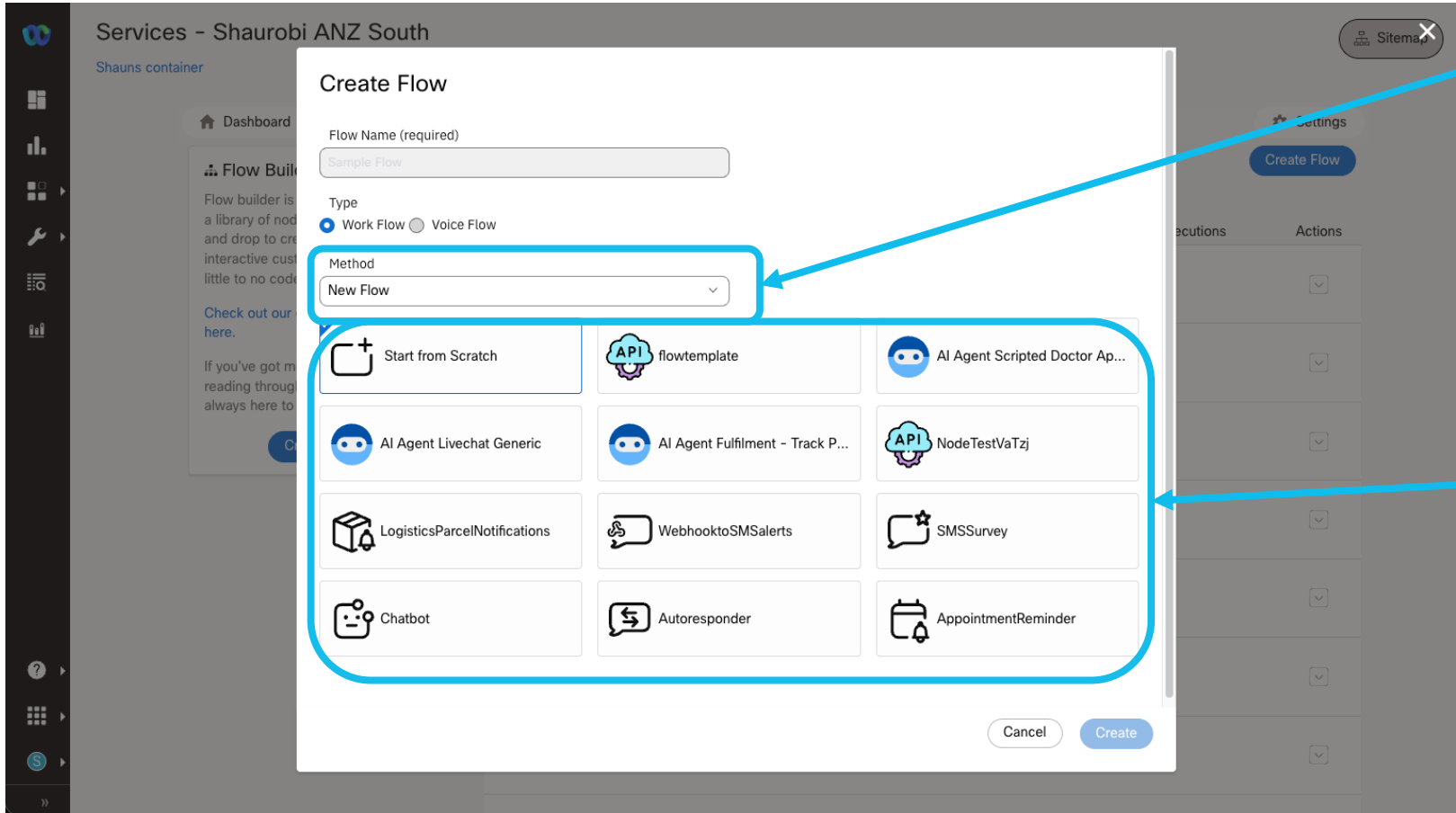
Search For Flows

Sort ByNewest

Flow execution data shown below is for last 30 days

Trigger	Flow	Status	State	Executions	Actions
	Recruiting_WhatsApp Flow Id:6445	Publishing Flow - v5 Live Flow - v4		8	
	Campus_wifi Flow Id:6416	Live		1	
	Summary Flow Id:6239	Live		2	
	Proactive_WithEscalation Flow Id:6219	Live		2	
	SMS_Testing Flow Id:6143	Live		0	
NA	Scripted_Test_template Flow Id:6056	Draft		0	
	Locator_Scripted Flow Id:6011	Live		0	

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.

Trigger descriptions

Select Trigger Category
Trigger categories contain various trigger events. This flow will trigger whenever these events occur

Channels


SMS


Messenger


WhatsApp


Mobile & Web App


Email


Apple Messages for Business

Trigger the flow based on an incoming message

Integrations


AI Agent


WxCC Task


Webex CC Task

Trigger the flow with an AI Agent or Webex CC Task

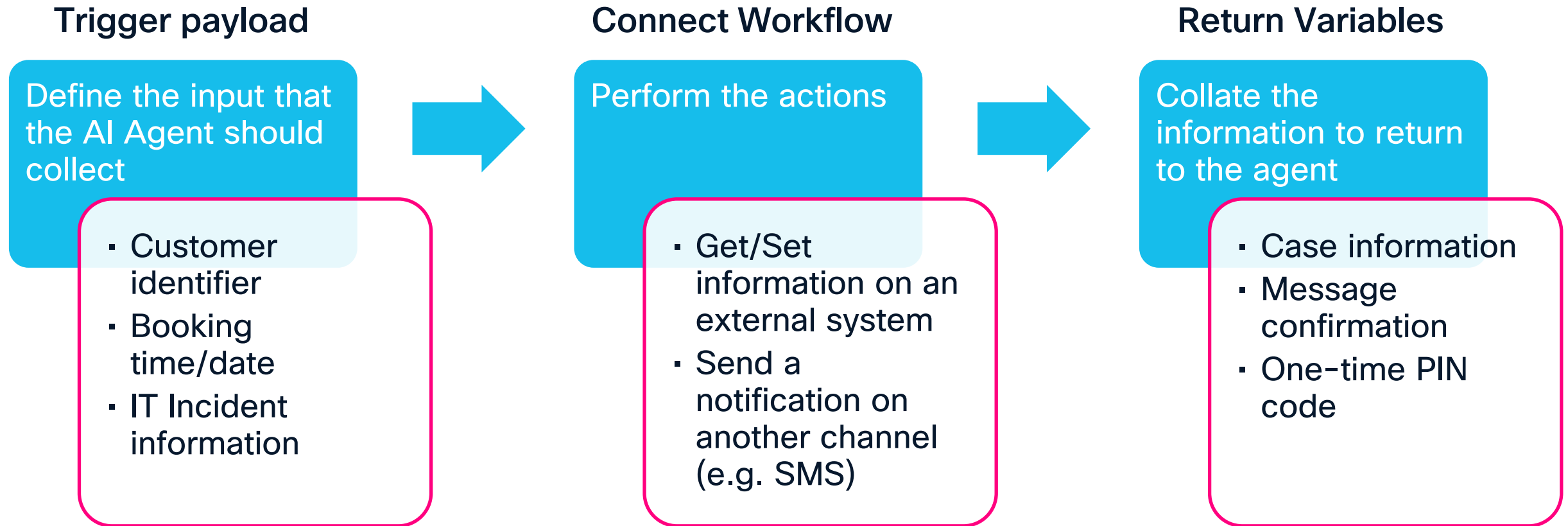
Custom


Webhook


Custom event

Trigger the flow using an API Webhook or event from SDK

The three steps to an action



AI Agent Trigger

Cars_GetContact_Airtable

Working Draft

Utilities

Channels

Integrations

UTILITIES

Evaluate

Branch

HTTP Request

Delay

Data Parser

Data Transform

Call Flow

Page Connector

Profile

Generate OTP

Build

Analyse

Configure AI Agent Event

Help

Configuration

Transition Actions (Optional)

Data Stream (Optional)

Configure the event and conditions to trigger the flow.

AI Agent initiated flow execution outcome are notified to AI Agent. The default notification payload is configured in the flow settings. If you want to include additional information in the notification payload, refer to the flow outcome settings. Warning operations such as Delay, Social Hour, and Receive nodes are not permitted in AI Agent flows.

Trigger from AI Agent to initiate flow

End Point URL

PROVIDE SAMPLE JSON

OUTPUT VARIABLES

PARSED VARIABLES(2)

Parse

Conditions

Flow will invoke only when these conditions are met

Start

Node ID: 2

Cancel

Save

https://hooks.au.webexconnect.io/flows/5820/trigger/aiagent

1 {

2 "CustomerANI": "0431123456",

3 "carRegistration": "SICKM8"

4 }

carRegistration:SICKM8

CustomerANI:0431123456

Output Variables

Node Outcomes

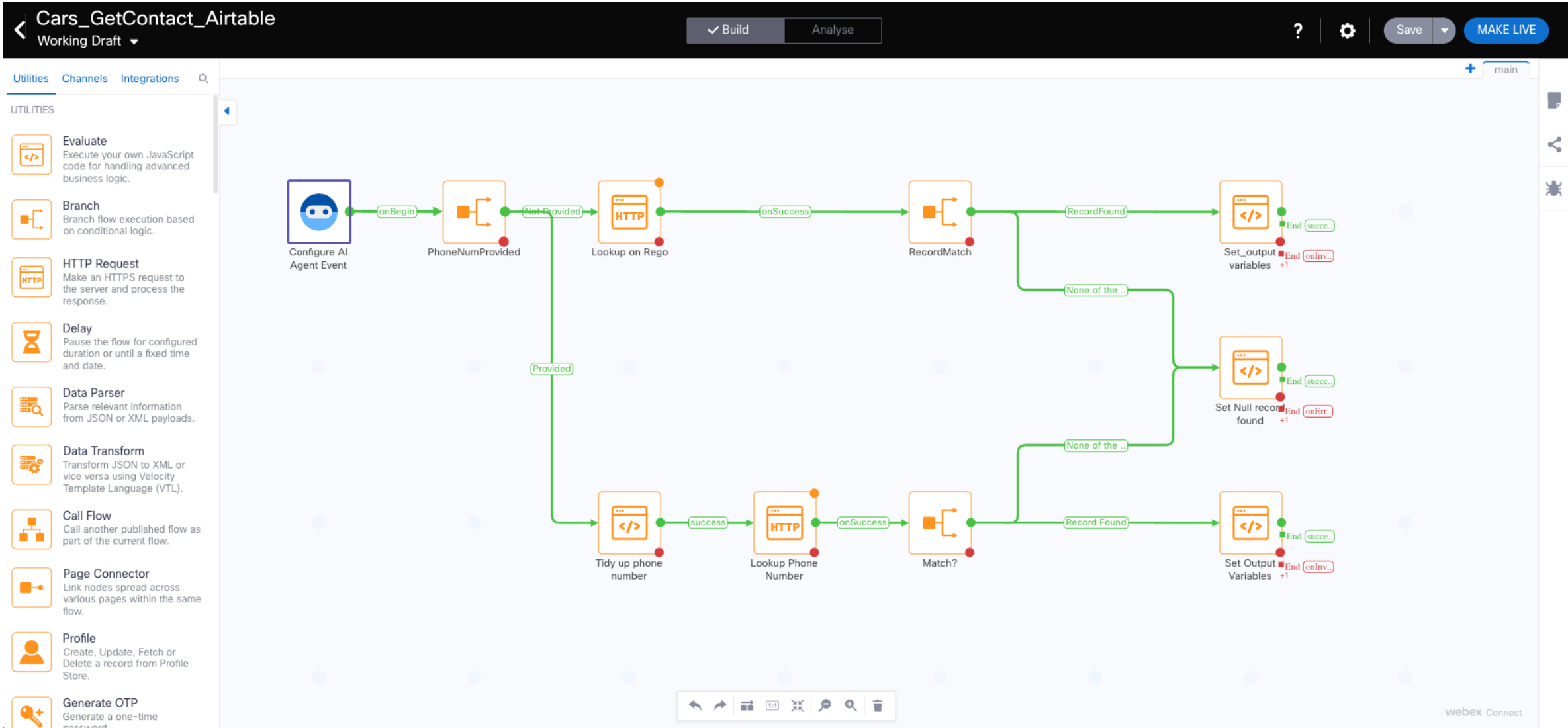
Define the sample input for the flow trigger

Press the "Parse" button and this will map them to output variables

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BRKCCT-2557

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



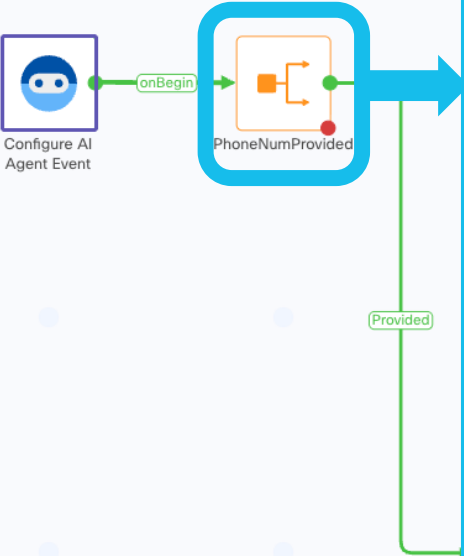
Did the customer provide a phone number?

Cars_GetContact_Airtable
Working Draft

Utilities Channels Integrations

UTILITIES

- Evaluate**
Execute your own JavaScript code for handling advanced business logic.
- Branch**
Branch flow execution based on conditional logic.
- HTTP Request**
Make an HTTPS request to the server and process the response.
- Delay**
Pause the flow for configured duration or until a fixed time and date.
- Data Parser**
Parse relevant information from JSON or XML payloads.
- Data Transform**
Transform JSON to XML or vice versa using Velocity Template Language (VTL).
- Call Flow**
Call another published flow as part of the current flow.
- Page Connector**
Link nodes spread across various pages within the same flow.
- Profile**
Create, Update, Fetch or Delete a record from Profile Store.
- Generate OTP**
Generate a one-time password.



PhoneNumProvided

Configuration Transition Actions (Optional)

Branch your flow based on conditional logic

Provided

Variable

\$(n2.aiAgent.CustomerAN)

Condition

Not equals

Value

\$(null)

AND

OR

+ Add Branch

Not Provided

Branch
Node ID: 3

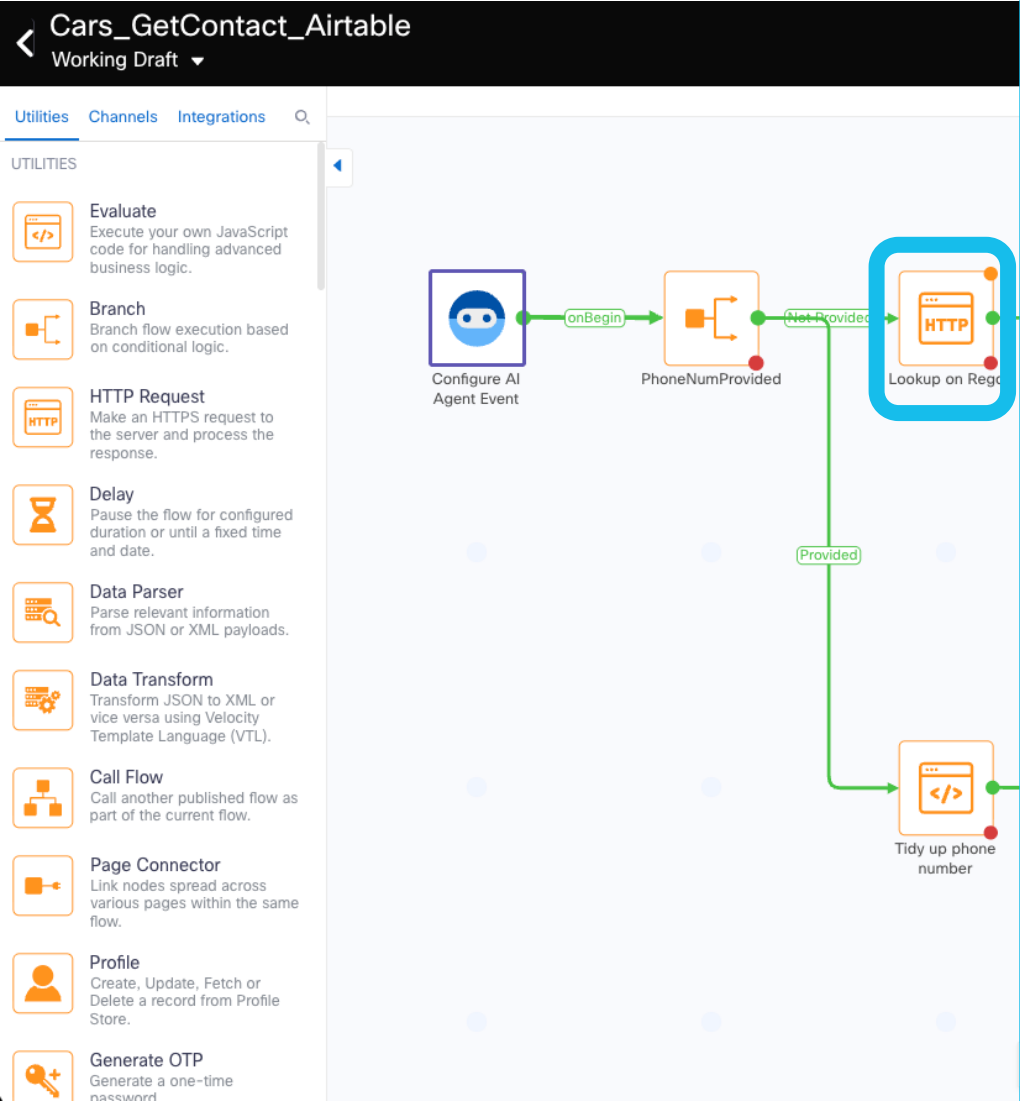
Test

Cancel

Save

webex Connect

Let's check based on registration



Lookup on Rego

Configuration Transition Actions (Optional)

Make GET, POST, PUT, PATCH and DELETE requests to your application

Method: GET Endpoint URL: https://api.airtable.com/v0/ REDACTED ?filterByFormula=rego=" \$(n

Header: Content-Type: application/json Authorization: Bearer REDACTED

+ Add Another Header

Connection Timeout: e.g., 1000 ms Request Timeout: e.g., 1000 ms

Proxy Address (Optional): e.g., 192.128.19.243:80

Output Variables

JSON XML Import From Sample

Output Variable Name	Response Entity	Response Path
custName	Body	\$.records[0].fields.name
custPhone	Body	\$.records[0].fields.phone
carMake	Body	\$.records[0].fields.make
custEmail	Body	\$.records[0].fields.email
carRego	Body	\$.records[0].fields.rego

Add Variable

Response

The response body will be stored in n4.http.responseBody variable.

Input Variables

Output Variables

Data generated by the node and subsequently

HTTP Request

- custName
- custPhone
- carMake
- custEmail
- carRego
- http.statusCode
- http.statusText
- http.responseBody
- http.responseHeader

Did we get a match?

⏪

Cars_GetContact_Airtable

Working Draft ▾

✓ Build

Analyse

?

⚙

Save ▾

MAKE LIVE

Utilities Channels Integrations 🔍

UTILITIES

 Evaluate
Execute your own JavaScript code for handling advanced business logic.

 Branch
Branch flow execution based on conditional logic.

 HTTP Request
Make an HTTPS request to the server and process the response.

 Delay
Pause the flow for configured duration or until a fixed time and date.

 Data Parser
Parse relevant information from JSON or XML payloads.

 Data Transform
Transform JSON to XML or vice versa using Velocity Template Language (VTL).

 Call Flow
Call another published flow as part of the current flow.

 Page Connector
Link nodes spread across various pages within the same flow.

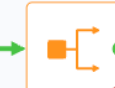
 Profile
Create, Update, Fetch or Delete a record from Profile Store.

 Generate OTP
Generate a one-time password

main

 Configure AI Agent Event

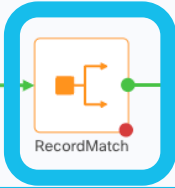
onBegin

 PhoneNumProvided

Not Provided

 Lookup on Rego

onSuccess

 RecordMatch

RecordFound

 Set_output variables +1

End (succe...)

End (onInv...)

RecordMatch

Help

Configuration

Transition Actions (Optional)

Branch your flow based on conditional logic

▼ RecordFound ✎

Variable ⓘ

Condition ⓘ

Value ⓘ

\$(n4.custName)

Not equals ▾

\$(null)

AND

OR

+ Add Branch

None of the above

webex Connect



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

Cars_GetContact_Airtable

Working Draft

BuildAnalyse

?

Save

MAKE LIVE

UtilitiesChannelsIntegrations

UTILITIES

Set_output variables

ConfigurationTransition Actions (Optional)

Configure node

Action 1

Time

On-enter

Action

Set variable

Variable	Value
carRego	\$(n4.carRego)
custName	\$(n4.custName)
custNumber	\$(n4.custPhone)
carMake	\$(n4.carMake)
custEmail	\$(n4.custEmail)
found	True

+ Add

+ Add Action

Input Variables

List of variables available as input for this node

Search

Custom Variables

[F5820]

null

carRego

custName

custEmail

custNumber

carMake

found

+ Add New Custom Variable

Start

Branch

HTTP Request

Branch

Node ID: 2

Node ID: 3

Node ID: 4

Node ID: 5

Set_output variables

Set Null record found

Set Output Variables

Generate OTP

Generate a one-time password

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BRKCT-2557

webex Connect

CISCO

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

Cars_GetContact_Airtable

Working Draft

Utilities Channels Integrations

Utilities

Evaluate

Branch

HTTP Request

Delay

Data Parser

Data Transform

Call Flow

Page Connector

Profile

Generate OTP

Flow Settings

General Custom Logs **Flow Outcomes** Custom Variables

Manage flow end results & optionally set outcome based notifications.

Use the standard outcomes available or create new custom outcomes. Once created, each flow end step can be tagged to raise one of the outcome events.

OUTCOME

STATUS CODE

DESCRIPTION

NOTIFY

Last Execution Status

All status codes

Last executed node event

Enabled

Notification Settings

Notify AI Agent

Custom

Define key-value pairs to be sent to the AI Agent.

Enter key and value

Enter JSON

KEY

VALUE

transactionID

\$(transid)

flowname

\$(flowname)

serviceName

\$(serviceName)

statuscode

1000

carMake

\$(carMake)

carRego

\$(carRego)

Flow id: 5820

Cancel

Save

Input Variables

List of variables available as input for this node

Search

Custom Variables [F5820]

null

carRego

custName

custEmail

custNumber

carMake

found

+ Add New Custom Variable

Start

Node ID: 2

Branch

Node ID: 3

HTTP Request

Node ID: 4

Save

MAKE LIVE

This data is made available within the AI Agent's context window.

Make sure the naming convention is somewhat intuitive.

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



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



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!

Utilities

Channels

Integrations



ServiceNow
ServiceNow



Airtable



MSFT Calendar
MS Shared Calendar for MEL
Appointments



Weather
Weather API integration

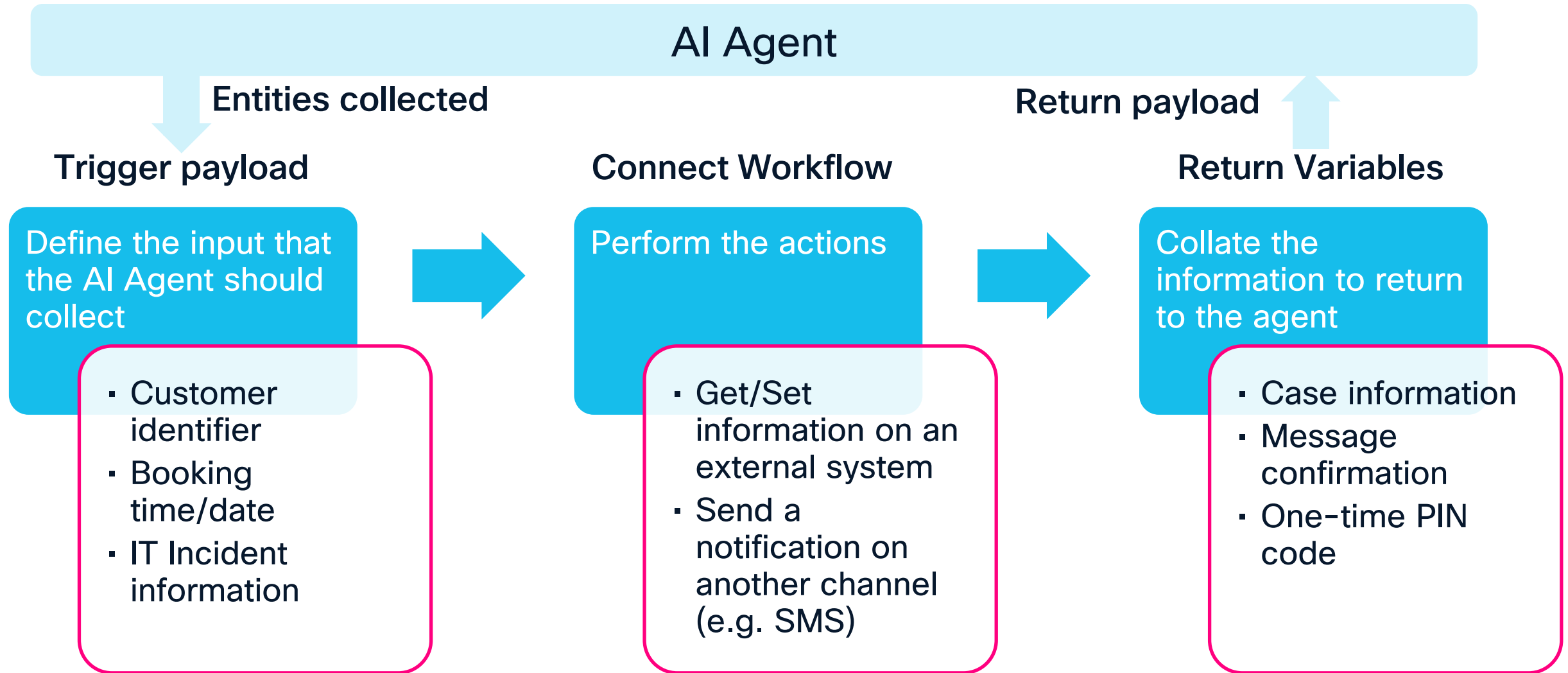


Dad Joke

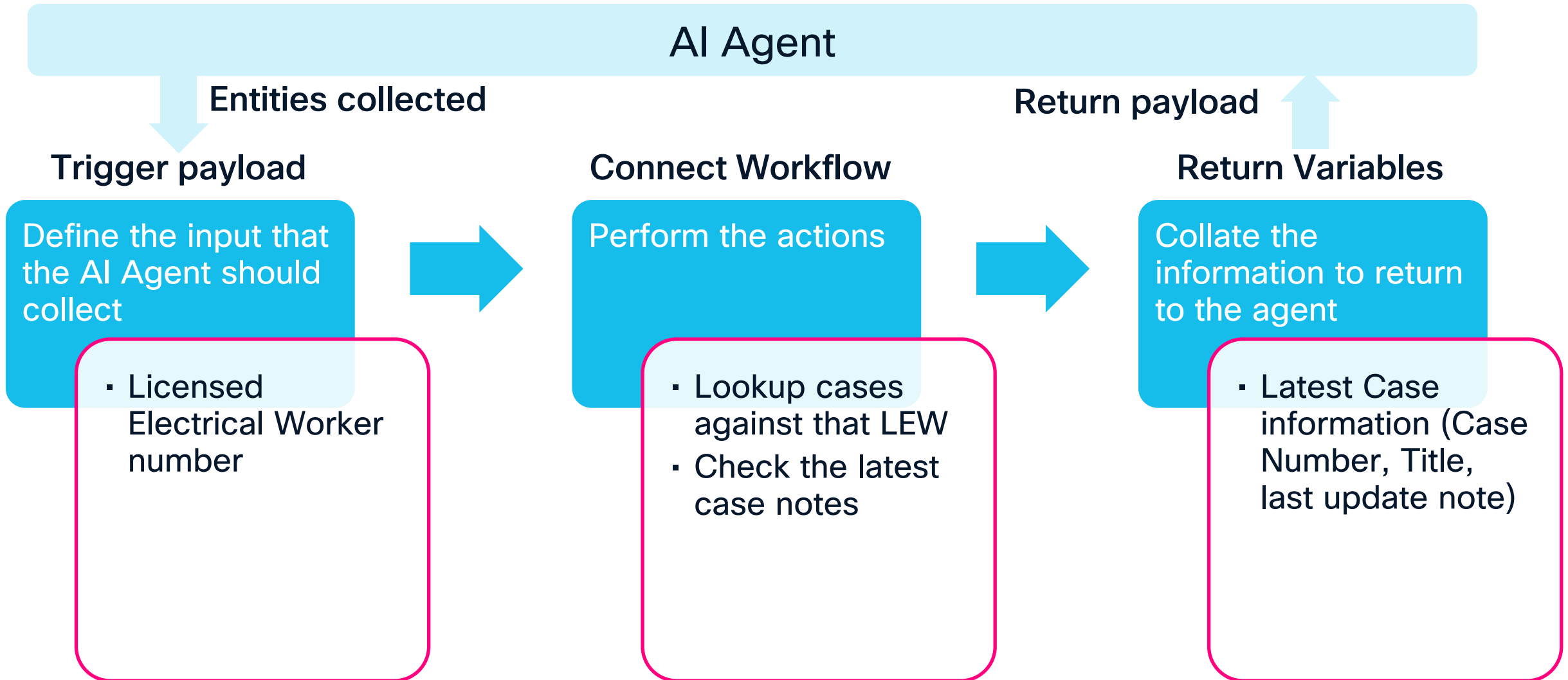
The background of the slide is an abstract composition of numerous thin, flowing lines in shades of blue, yellow, orange, and purple, creating a sense of motion and energy. A large, semi-transparent white rectangle is positioned on the left side of the slide, serving as a backdrop for the main text.

Putting things into Action!

The three steps to an action



Checking a new connection request



Where the Action is

Utilities

Last Updated at 16 Oct, 25 by Shaun Robinson

Preview

Configuration

Sessions

History

Analytics

AI agent configuration

Published

Save changes

Profile

Knowledge

Actions

Language

What is an action?

+ New action

Action name	Created by	Description	Last updated	Controls
<div><div></div>Agent handover</div>	System	Escalate the conversation to a human agent if the user asks for it.	7 Jul 25, 12:31 PM	
<div><div></div>ConfirmAddress</div>	Shaun Robinson	Validate the caller's address	6 Oct 25, 1:04 PM	<div><div></div><div></div></div>
<div><div></div>RaiseCase</div>	Shaun Robinson	Raise a case to report a fault	6 Oct 25, 1:06 PM	<div><div></div><div></div></div>
<div><div></div>Send_SMS_Link</div>	Shaun Robinson	If you have a link that could assist the customer, or the customer requests a link, send it using this service. If the customer's provided their phone number previously, reuse that number	6 Oct 25, 1:13 PM	<div><div></div><div></div></div>

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

Update action

Enable your AI agent to connect with external systems and perform more complex tasks.

General information

Action name *

NewConnectionCase

Action description * ⓘ

Raise a request for connection at a new property.

Action scope *

Slot filling and fulfillment ▼

Slot filling

Add input entities in a table or define input parameters in JSON for slot filling to ensure the AI agent gathers all necessary information.

Input entities

</> Use JSON instead ⓘ

✕ Cancel

→ Save

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.

Update action

Enable your AI agent to connect with external systems and perform more complex tasks.

Slot filling

Add input entities in a table or define input parameters in JSON for slot filling to ensure the AI agent gathers all necessary information.

Input entities

</> Use JSON instead ⓘ

+ New input entity

Entity Name	Type	Value	Description	Example	Required	Controls
Address	string	-	The new address to be connected	101 Collins Street, Melbourne	Yes	
Description	string	-	A description of the connection required	New build	Yes	
Licensed Electrical Worker license	string	-	Licensed Electrical Worker license	A 47170	Yes	

Let's test it out!

at 5 Nov, 25 by Shaun Robinson

Preview

AI agent configuration

Published

Save changes

Profile

Knowledge

Actions

Language

Goal and instruction tips

- Explain what the agent's purpose is.
- Break down the overall goal into specific, sequential steps and tasks.
- Reference the actions at each step that are used to fulfil each step and task
- Define the personality and expertise of the AI agent, e.g. friendly, formal, or casual.

Agent name *

Utilities

URL for agent profile image *

https://studio.aiagent-anz1.cisco.com,

System ID *

Utilities-zstUZEjc

AI engine *

Webex AI Pro 1.0

Ideal for most contact center use cases with globa

Agent's goal *

You are a polite, friendly agent designed to answ
of a power distributor.

Utilities



Preview Utilities

Start a call or chat to experience a simulated conversation with this AI agent. A voice transcript will show here for calls.

Use a headset for the best experience.

Start a chat

Start a call

Debugging actions in AI Studio

Utilities

Last Updated at 5 Nov, 25 by Shaun Robinson

Configuration

Sessions

History

Analytics

Sessions

Sessions capture all interactions with your AI agent, providing insight into what happens behind the scenes.

Refine Results

Session ID

Consumer ID

Interaction ID

Filter Channels

Select channels to display

Last updated

Metadata

☐ Hide test sessions

☐ Agent handover happened

☐ Error occurred

SubmitClear

Channels	Session ID	Messages	Updated at	Metadata
	0db65193-0a3c-4e96-a098-a616107ced5c	5	11 Nov 25, 10:02 AM	
	34853f5e-102a-415c-ae16-ef56780da96d	9	5 Nov 25, 1:13 PM	
	74cb0e2e-f8c2-405a-b3db-d0217f34f80d	9	5 Nov 25, 1:12 PM	
	7122fbd2-6b08-41fd-9bec-c6201adda4f9	3	27 Oct 25, 1:50 PM	
	4057a303-f2b7-4238-a697-64c50eed8804	12	27 Oct 25, 1:39 PM	
	9205bfad-2af9-4e07-8726-4440f1e85729	12	27 Oct 25, 1:30 PM	
	5cae4d9f-		27 Oct 25, 1:28 PM	

Showing 1 to 10 of 25 items

Session flags

Testing sessions, decrypted chats, guardrail hits, agent escalation etc.

Checking action fulfilment

Utilities

Last Updated at 5 Nov, 25 by Shaun Robinson

Session ID: 0db65193-0a3c-4e96-a098-a616107ced5c

Consumer ID: 5db000f6-7f93-43ae-8edc-d0193d8d565b • Total Messages: 5

Last updated at: Nov 11 '25 10:02 AM

Search

10:02:05 AM, NOV 11, 2025

Txn ID: 7bc2505e2de84223b4d7fcfb69bb4d15

A47172

10:02:10 AM, Nov 11, 2025

Performing action "CheckConnectionCase"

Your new connection request for "New build requiring 3 phase" at 101 Collins Street, Melbourne is currently on hold, pending confirmation of availability of a 3 phase circuit. The last update was made today by Alan Admin.

Would you like to proceed with your case?

Submit Clear

Fulfillment output:

Transaction ID: ad95e7f5-5918-4eaa-85c0-4bbaf19585d3

Size: 619

Output:

1 {

2 "Case

3 Description": "New build requiring 3 phase",

4 "Case Last Update notes": "<p>Approval on hold, pending confirmation of availability of 3 phase circuit.</p>",

5 "Case Last Updated By": "Alan Admin"

Messages

5

9

9

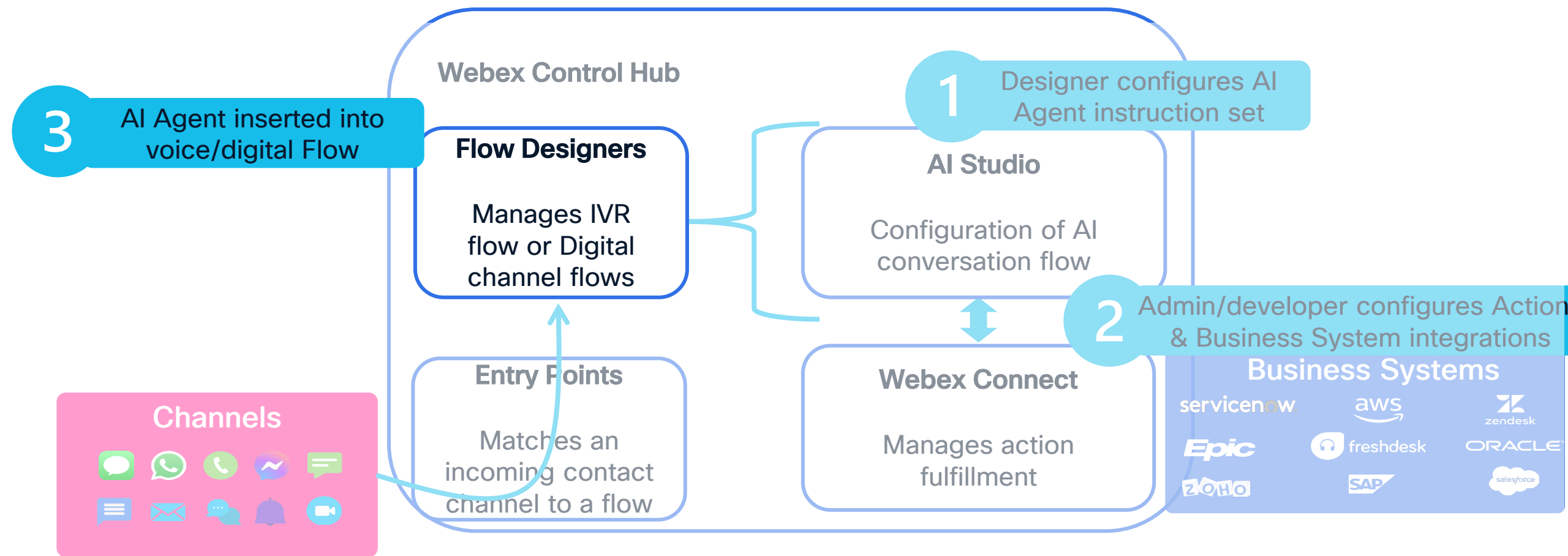
3

12

13

5

Action Output
Shows info returned from
Action Flow



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

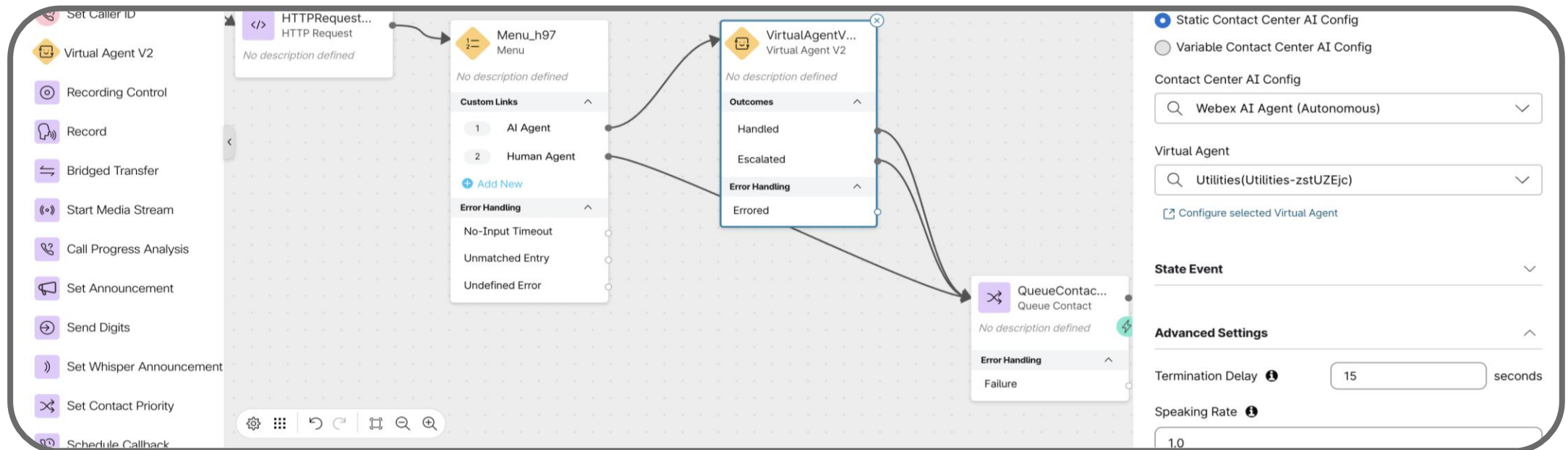
AI Agent configuration is contained in the Virtual Agent Node for Voice and the AI Agent node for Digital Channels.

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.



Handling AI Agent escalation

Providing agent context

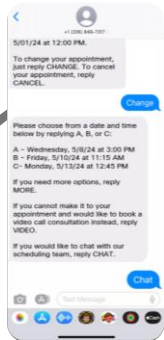
Anticipate needs

24/7 Front door

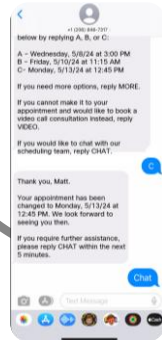
Fulfil requests automatically

Seamless handover

Empathetic humans



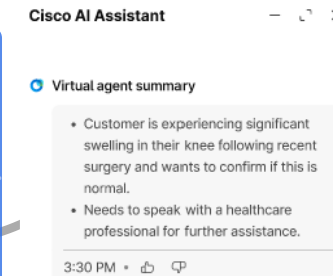
Proactive notification



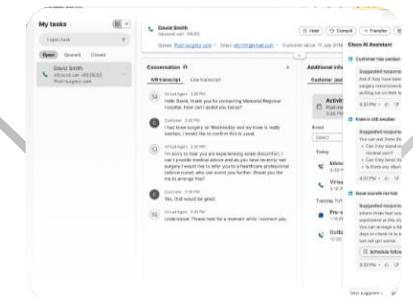
Self-service



Interaction with Business Systems



Handover to human agent



Agent engagement

Providing Agent information upon escalation

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

The screenshot shows the 'Parse Settings' configuration in the Agent Desktop. The 'Input Variable' is set to 'VirtualAgentV2_amt.Metadata'. The 'Content Type' is set to 'JSON'. The 'Output Variable' is set to 'DropOff'. The 'Path Expression' is set to '\$.actions.cars_BookService.[0].input.serviceTime'. Below the configuration, the 'VirtualAgentV2' agent is shown with a 'Parse' action. The 'Parse' action is configured with 'Input Variable = VirtualAge...' and 'Set Variable = BOT_Transcript = {{VirtualA...}}'. The 'Set Variable' action is configured with 'Set Variable = BOT_Transcript = {{VirtualA...}}' and 'Error Handling = Undefined Errors'. The 'Drop-off Time' is set to '10:00' and the 'Booking Date' is set to '12/11/2025'.

Ensure AI Agent actions are generating Journey Data Services events

The screenshot shows the Journey Data Services interface. The 'Live transcript' section displays a customer journey for 'Shaun Robinson'. The journey includes actions such as 'Raise Case', 'SMS', and 'Journey'. The 'Lookup Identity' section shows the customer's information. The 'Customer information' section shows the customer's name, phone number, and service location. The 'Filter By' section shows the filter set to 'All'. The 'Time range' section shows the time range set to 'All'. The 'Outbound Call' section shows a call log with a duration of 14 minutes. The 'New case raised' section shows a new incident ID 'INC0010339' and a URL 'https://dev322612.se'. The 'Password reset link sent' section shows a link sent to the SSPP Portal.

Empowering your agents

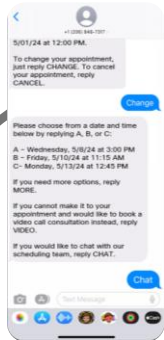
Anticipate needs

24/7 Front door

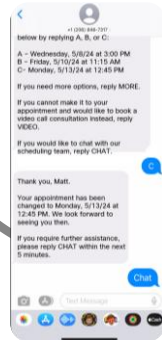
Fulfil requests automatically

Seamless handover

Empathetic humans



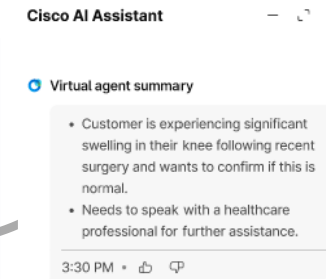
Proactive notification



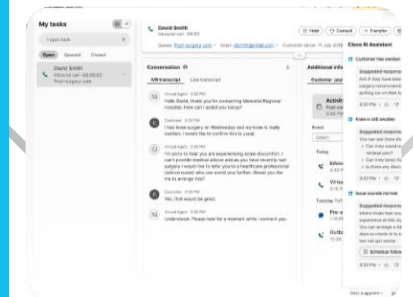
Self-service



Interaction with Business Systems



Handover to human agent

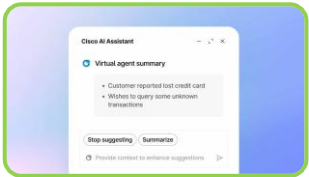


Agent engagement

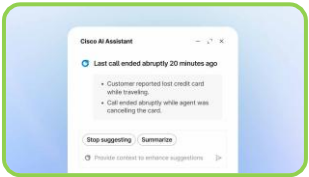


AI Assistant Capabilities

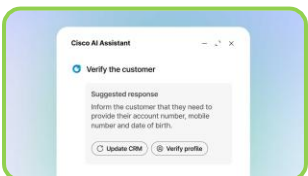
BRKCCT-2532
Designing Modern Agent Experiences with AI Assistant
Check the recording!



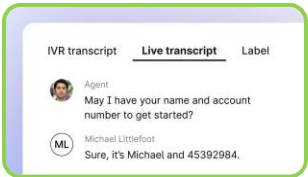
AI Agent context transfer summary



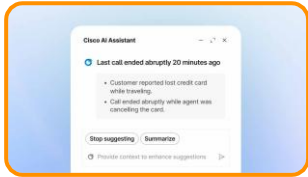
Dropped call summaries



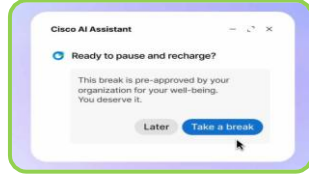
Suggested Responses



Real time transcription



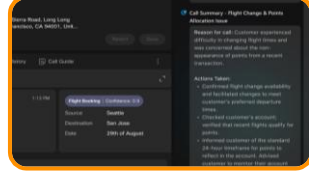
Consult/Transfer Summary



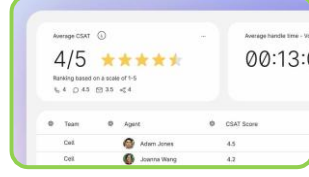
Agent Wellness Breaks



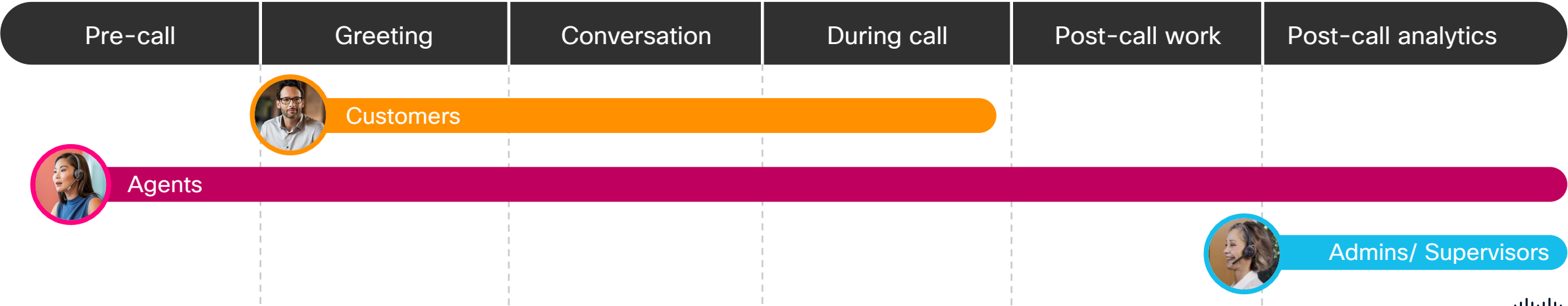
Topic Analytics



Wrap up summaries & wrap up codes

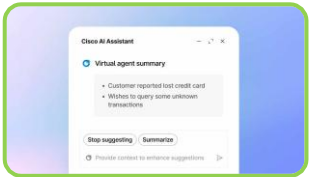


Auto CSAT (voice)

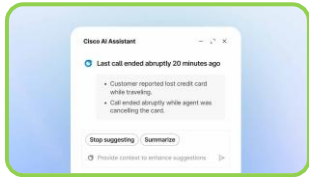




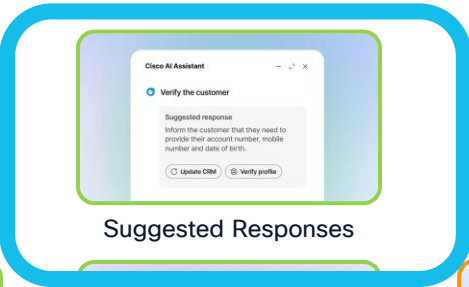
AI Assistant Capabilities



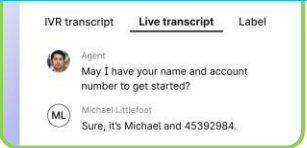
AI Agent context transfer summary



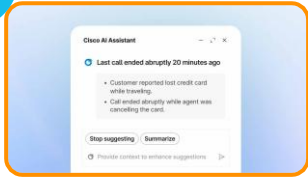
Dropped call summaries



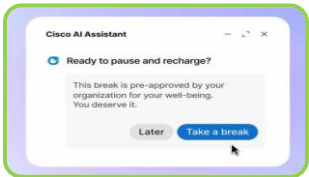
Suggested Responses



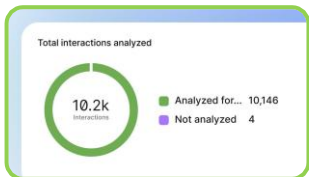
Real time transcription



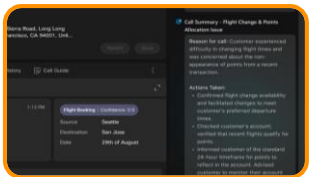
Consult/Transfer Summary



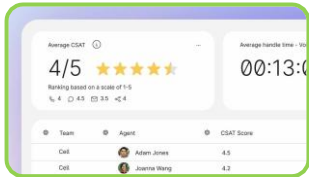
Agent Wellness Breaks



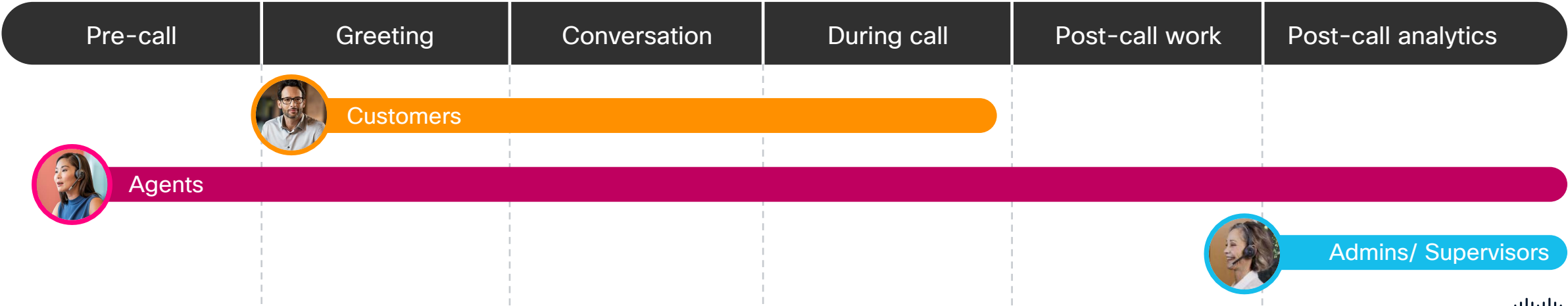
Topic Analytics



Wrap up summaries & wrap up codes



Auto CSAT (voice)



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

+1 (310) 3412 9901

00:05

Hold

Consult

Transfer

Pause Recording

End

Phone Number	+1 (310) 3412 9901	DNIS	+
Queue	12	IVR Path	IV
Queue Name	IVR_Queue_1	Alternate Number	00
Address	3772 AVE NE Sierra Road, Long Long County, San Francisco, CA 94001, Unit...		

IVR Transcript

Contact History

Live Transcript

IVR Transcript

Virtual Agent

11:22 AM

Hello, how may I help you today?

Customer

11:23 AM

Hi, I wish to report what appears to be a fraudulent transaction on my account.

Sentiment: 1

Virtual Agent

11:24 AM

Ok, we can definitely help with that. Let me transfer you to our transaction monitoring department.

Transaction Monitoring | Confidence: 1

Cisco AI Assistant

Suggested response

Inform the customer that they need to provide their account number, mobile number and date of birth.

Update CRM

Verify profile

11:32 AM •

Open a case

Suggested response

Collect the transaction date, amount and optionally the transaction id. Create a case and share the number or send a text message. Insurance covers \$10K.

Create case

11:32 AM •

Schedule followup

Suggested response

Ask the customer for preferred times for a callback from the monitoring team. They will call back within 48 hours. Optionally offer prime expedited processing within 12 hours for \$25.

Callback queue

Send SMS

11:32 AM •

Stop suggesting

Summarize

Provide context to enhance suggestions



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

November 04, 2025 | 78791 view(s) | 64 people thought this was helpful

View change log Subscribe

What's new for administrators in Webex Contact Center

We want to make sure that you know about the major updates made available in Webex Contact Center for administrators—updates to the interface, new functionality, and ways to manage your contact center.

- What's new
- Coming soon
- Limitations
- Announcements

We are sharing details about our planned feature releases that are coming out soon. Cisco may make changes to the anticipated features in its sole discretion. You can subscribe to this article to get updates on any changes.

AI Assistant – Actions in Suggested Responses

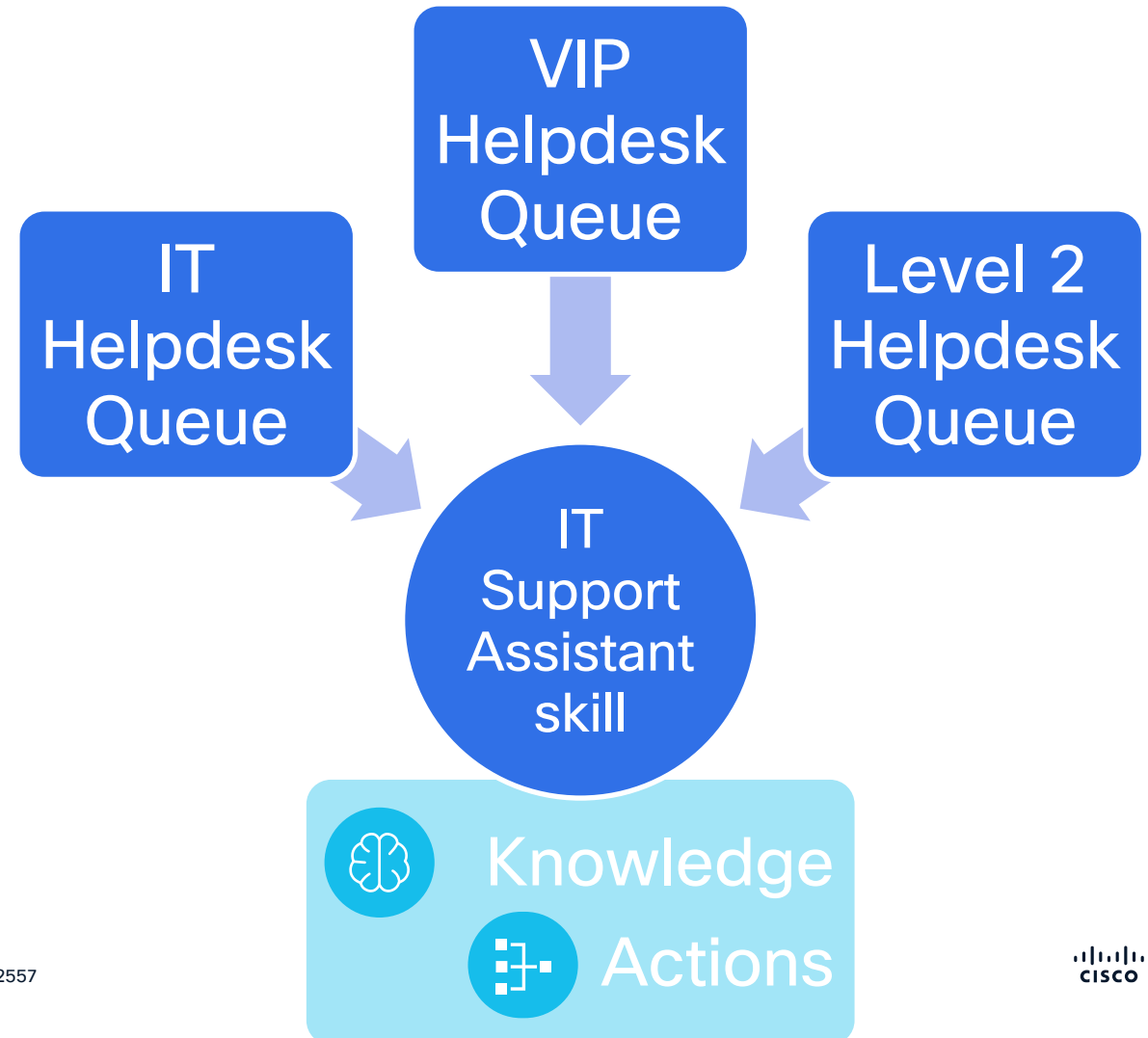
The AI Assistant's Suggested Responses feature currently provides real-time, contextual guidance to agents during customer interactions. Soon, we will be expanding its capabilities with the introduction of "Actions". This will allow the AI Assistant to:

- Access and present relevant information from a wider range of tools, in addition to existing knowledge bases, directly to agents during a customer conversation.
- Offer specific action recommendations to agents during interactions.
- Automate and execute certain actions on behalf of agents.

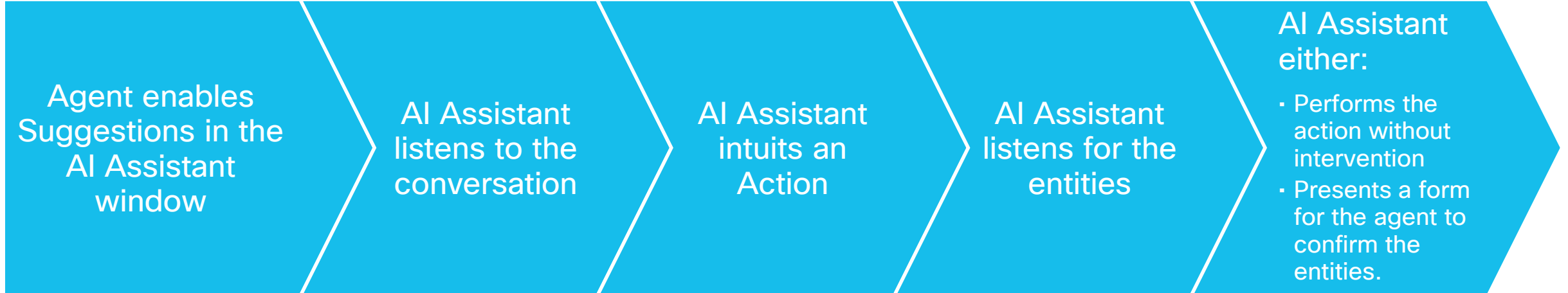
These enhancements will further empower agents by integrating more tools and automating routine task.

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



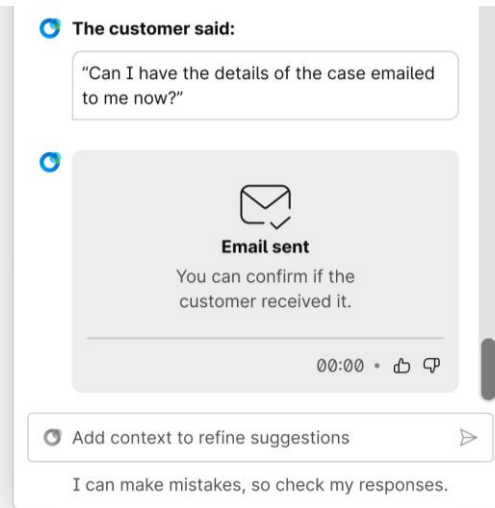
AI Assistant Actions



AI Assistant Actions

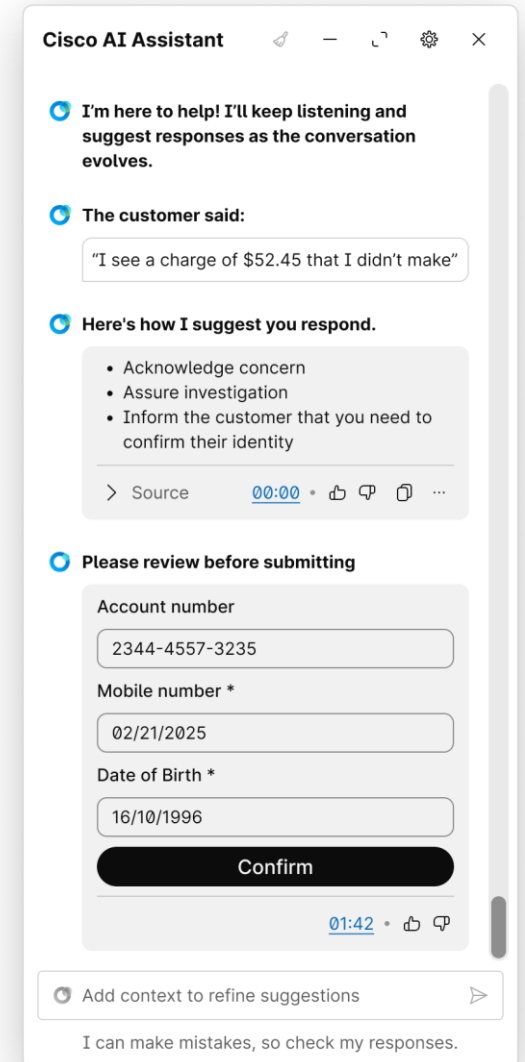
Unmoderated Actions

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

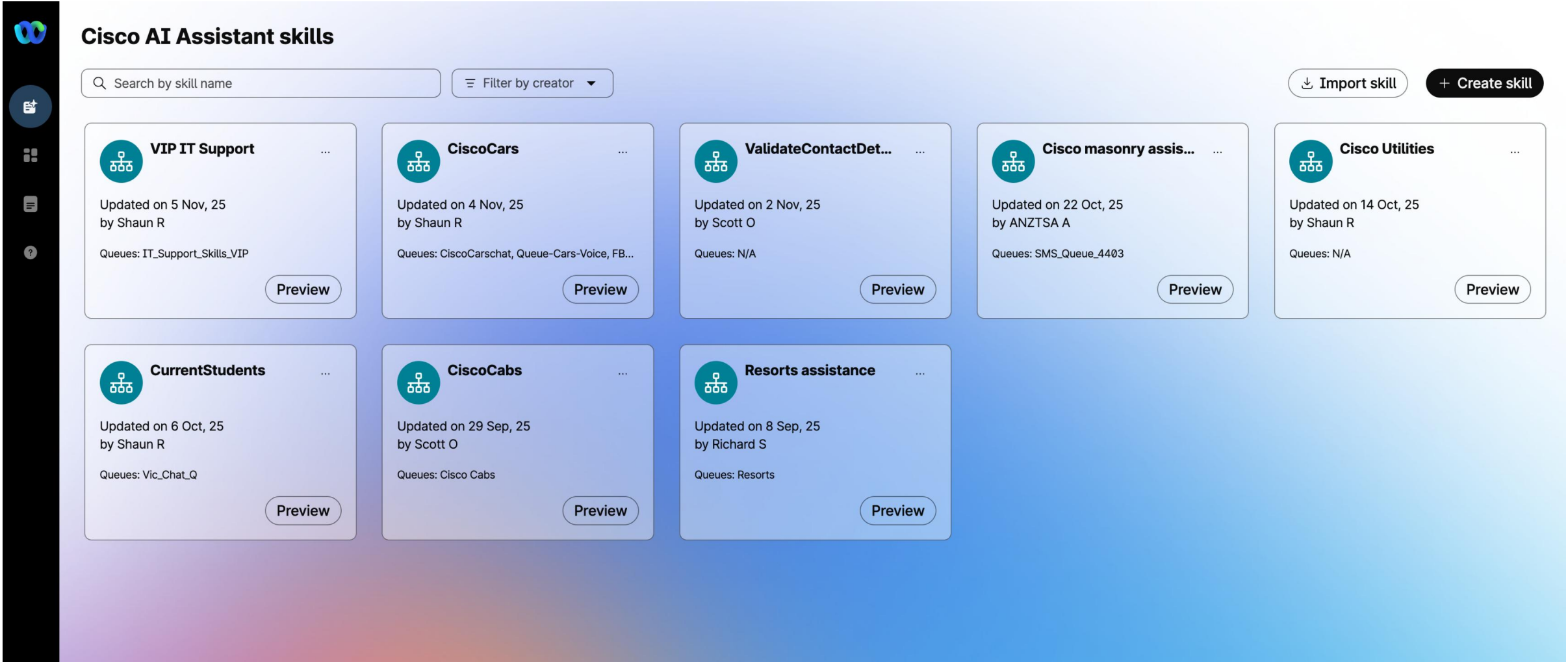


Moderated Actions

- 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



Configuring your AI Assistant Skills



The interface displays a grid of AI Assistant Skills. Each skill card includes a Cisco logo, the skill name, the update date and creator, the queues it serves, and a 'Preview' button. The skills are arranged in two rows. The top row contains five skills, and the bottom row contains three skills. The interface also includes a search bar, a filter dropdown, and buttons for 'Import skill' and 'Create skill'.

Skill Name	Updated On	By	Queues
VIP IT Support	5 Nov, 25	Shaun R	IT_Support_Skills_VIP
CiscoCars	4 Nov, 25	Shaun R	CiscoCarschat, Queue-Cars-Voice, FB...
ValidateContactDet...	2 Nov, 25	Scott O	N/A
Cisco masonry assis...	22 Oct, 25	ANZTSA A	SMS_Queue_4403
Cisco Utilities	14 Oct, 25	Shaun R	N/A
CurrentStudents	6 Oct, 25	Shaun R	Vic_Chat_Q
CiscoCabs	29 Sep, 25	Scott O	Cisco Cabs
Resorts assistance	8 Sep, 25	Richard S	Resorts

Configuring your AI Assistant Skills

The screenshot displays the 'Skill Configuration' page for an AI Assistant named 'VIP IT Support'. The page is divided into several sections: a top header with the assistant's name and a 'Last Updated' timestamp, a 'Skill Configuration' title with a 'Published' status, and a 'Change the AI Assistant's skill configuration' instruction. Below this, there are tabs for 'Profile', 'Knowledge', 'Actions', and 'Language'. The 'Knowledge' tab is selected and highlighted with a blue box. A blue callout box labeled 'Knowledge' points to this tab, containing the text 'Configured documents or articles for knowledgebase'. The main configuration area contains a 'Name' field with the value 'VIP IT Support', a 'System ID' field with the value 'VIP_IT_Support-jRLPj3D6', and a 'Goal' section. The 'Goal' section is highlighted with a blue rounded rectangle and contains the text: 'To assist VIP employees with issues related to IT, including basic troubleshooting, ordering new corporate hardware, and raising software requests.' A blue callout box labeled 'Assistant Configuration' points to the 'Goal' section, containing the text 'Goal and Instruction set'. Below the 'Goal' section is an 'Instructions' section with the text: 'Make sure that the agent greets all VIP callers using their full name. If an employee is requesting a new laptop, ask them which operating system they'd prefer (Mac OSX, Windows or Linux), then provide recommendations based on their preferred operating system. Once they confirm preferred model, capture and raise the request using [[RaiseDeviceRequest]].' The interface also includes a 'Preview' button in the top right and a 'Save changes' button in the bottom right.

Knowledge
Configured documents or articles for knowledgebase

Assistant Configuration
Goal and Instruction set

VIP IT Support
Last Updated at 5 Nov, 25 by Shaun Robinson

Skill Configuration Published
Change the AI Assistant's skill configuration

Profile Knowledge Actions Language

VIP IT Support

System ID *
VIP_IT_Support-jRLPj3D6

Goal [Insert example](#)

To assist VIP employees with issues related to IT, including basic troubleshooting, ordering new corporate hardware, and raising software requests.

Instructions

Make sure that the agent greets all VIP callers using their full name.

If an employee is requesting a new laptop, ask them which operating system they'd prefer (Mac OSX, Windows or Linux), then provide recommendations based on their preferred operating system. Once they confirm preferred model, capture and raise the request using [[RaiseDeviceRequest]].

Preview Save changes

Configuring your AI Assistant Actions

←

VIP IT Support

Last Updated at 5 Nov, 25 by Shaun Robinson

Preview

⋮

Configuration

Sessions

History

Skill Configuration

Published

Change the AI Assistant's skill configuration

Profile

Knowledge

Actions

Language

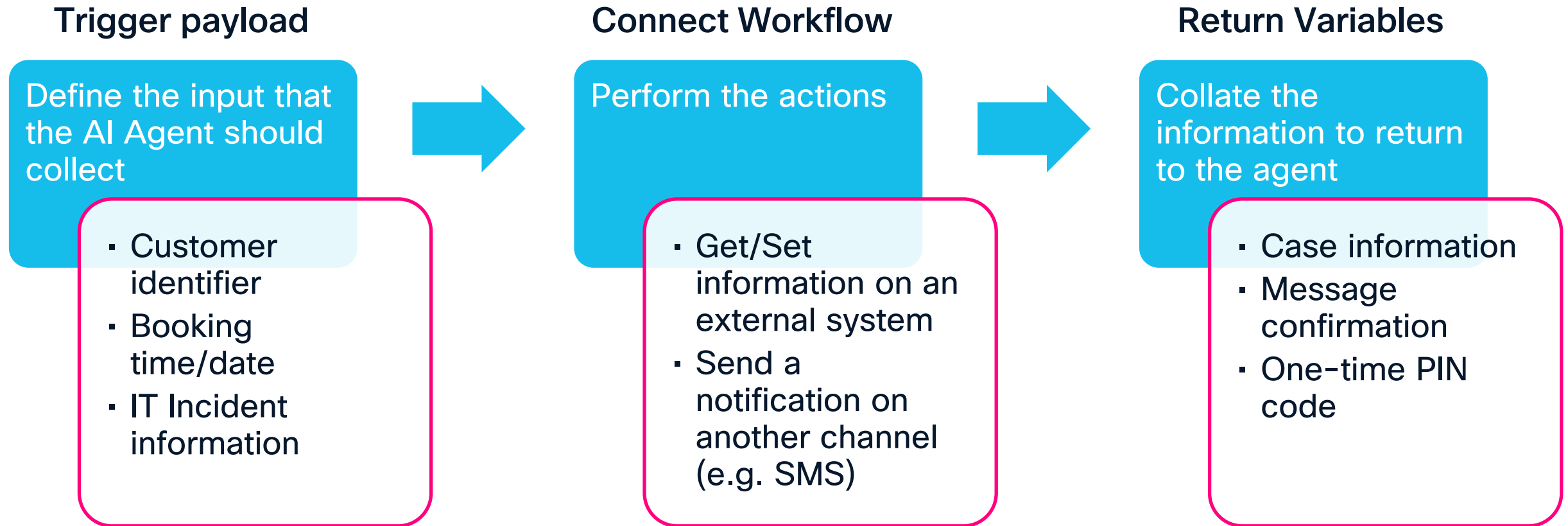
What is an action? ⓘ

+ New action

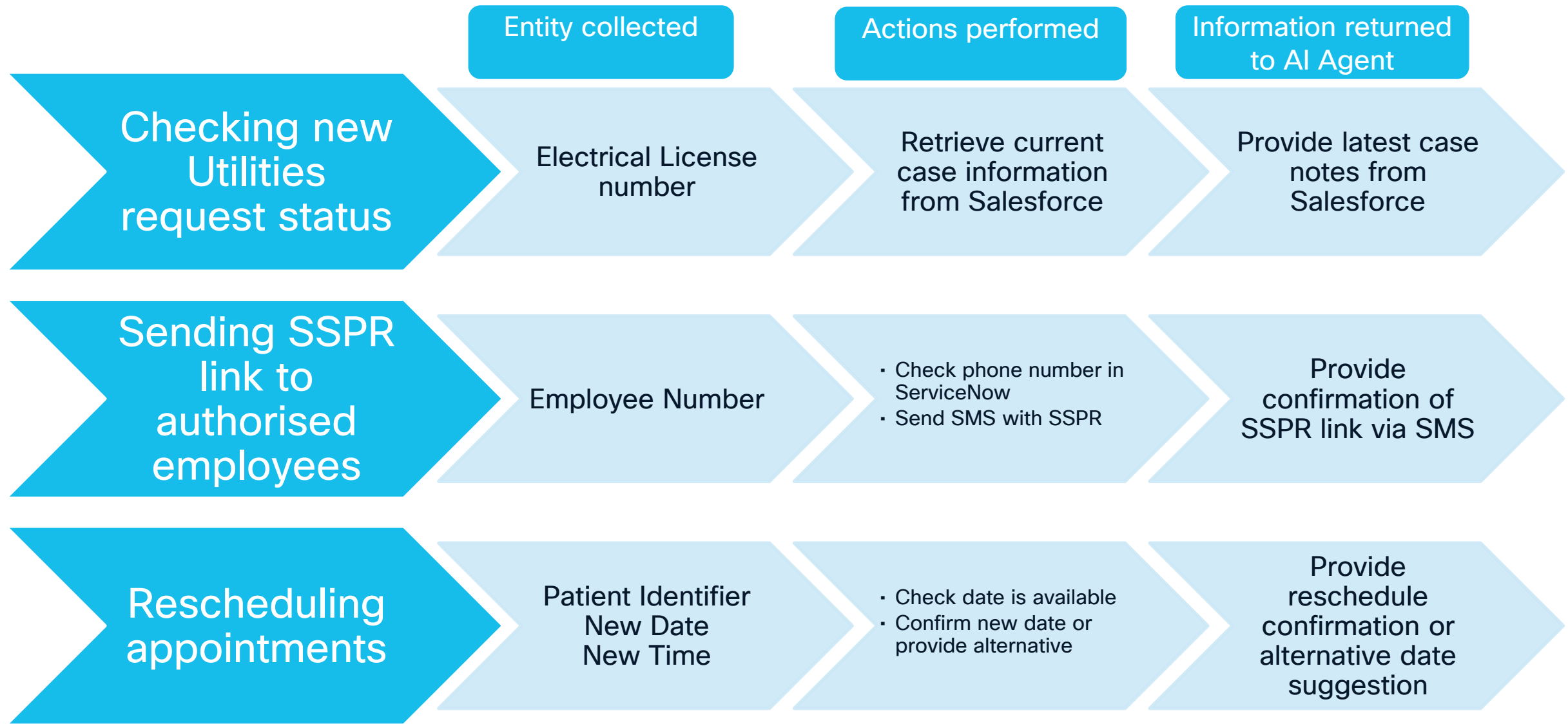
Action name	Created by	Description	Last updated	Controls
<div><div><div></div></div><div>RaiseDeviceRequest</div></div>	Shaun Robinson	Raise a request for a new device	5 Nov 25, 9:41 PM	<div><div></div><div></div></div>

Examples of complete Actions

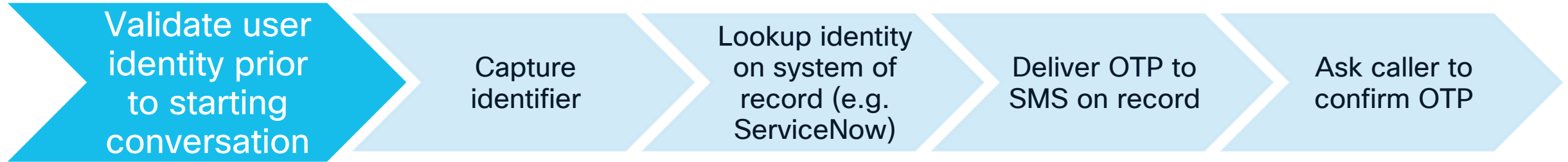
The three steps to an action



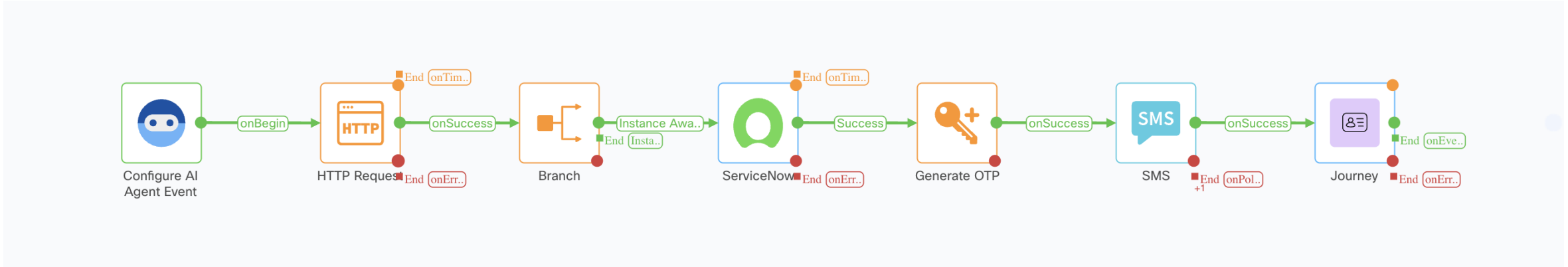
Action Examples



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



- 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:



Here’s the One-Time PIN in action

To help you book a flight, I need to verify your identity first. Could you please provide your six-digit employee ID? Once I have that, I'll send a One Time PIN to your registered mobile number for verification.

9:41:07 PM, Nov 4, 2025

n ID: 1acb8b39034342548e02b88a2899932e



189154

9:41:09 PM, Nov 4, 2025

Performing action "IDV"

I've sent a One-Time PIN to your registered mobile number. Please enter the PIN you received so I can verify your identity and assist you with your flight booking.

9:41:20 PM, Nov 4, 2025

n ID: 0c9ece3b1a8f4de694e05fda0d50a4e4



740324

9:41:38 PM, Nov 4, 2025

Thank you for providing the One-Time PIN. Your identity has been verified.

How can I assist you with your flight booking? Please provide the following details:

- Departure city
- Destination city
- Departure date
- Is this a one-way or return flight? (If return, please provide the return date)



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.

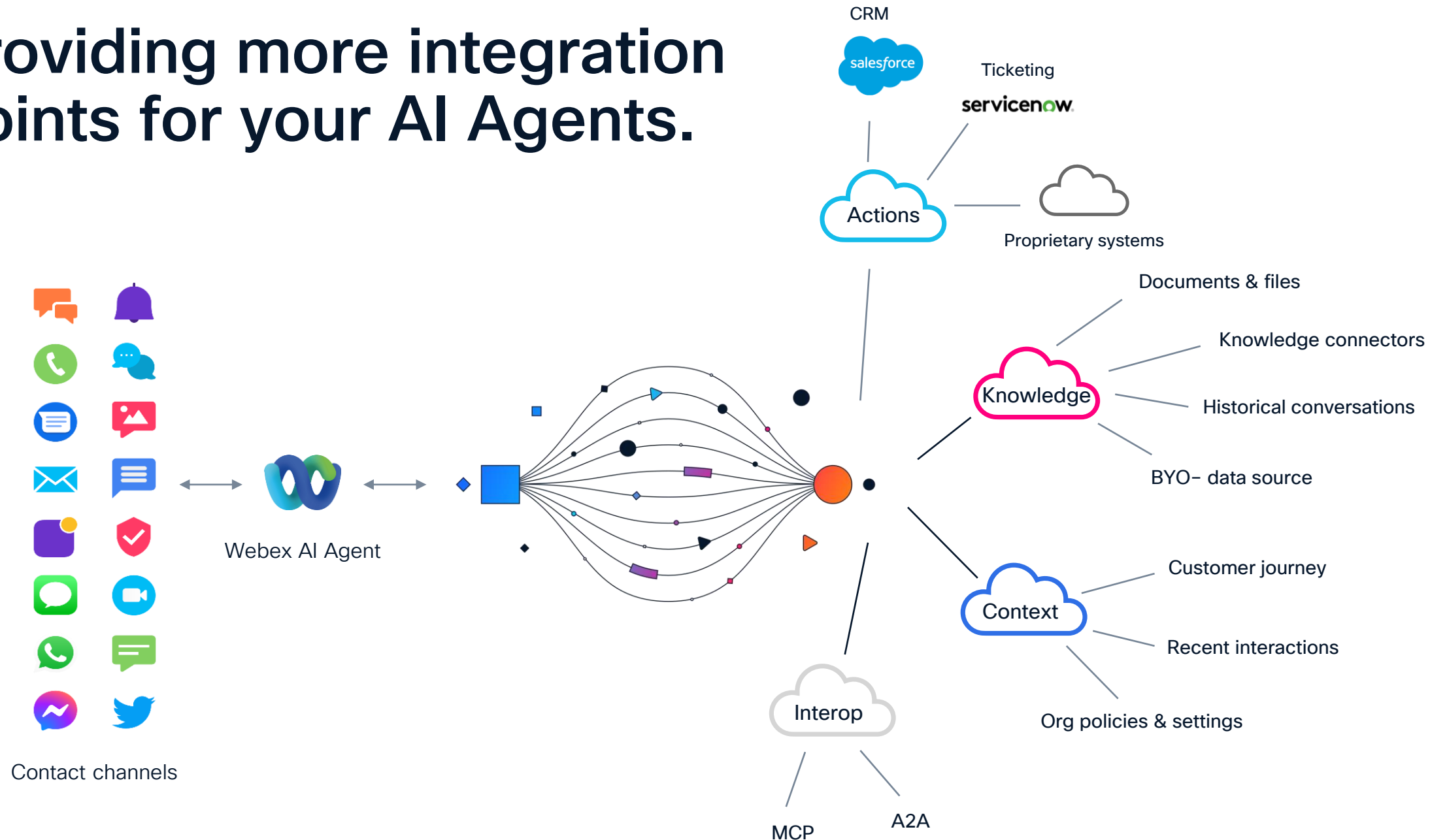
What next?

AI Studio enhancements in 2026

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



Providing more integration points for your AI Agents.



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

Complete your session evaluations



Complete a minimum of 4 session surveys and the Overall Event Survey to claim a Cisco Live T-Shirt.



Earn up to 800 points by completing all surveys and climb the Cisco Live Challenge leaderboard.



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Attend the interactive education with Capture the Flag, and Walk-in Labs



Visit the On-Demand Library for more sessions at www.CiscoLive.com/on-demand

Thank you

CISCO Live !

