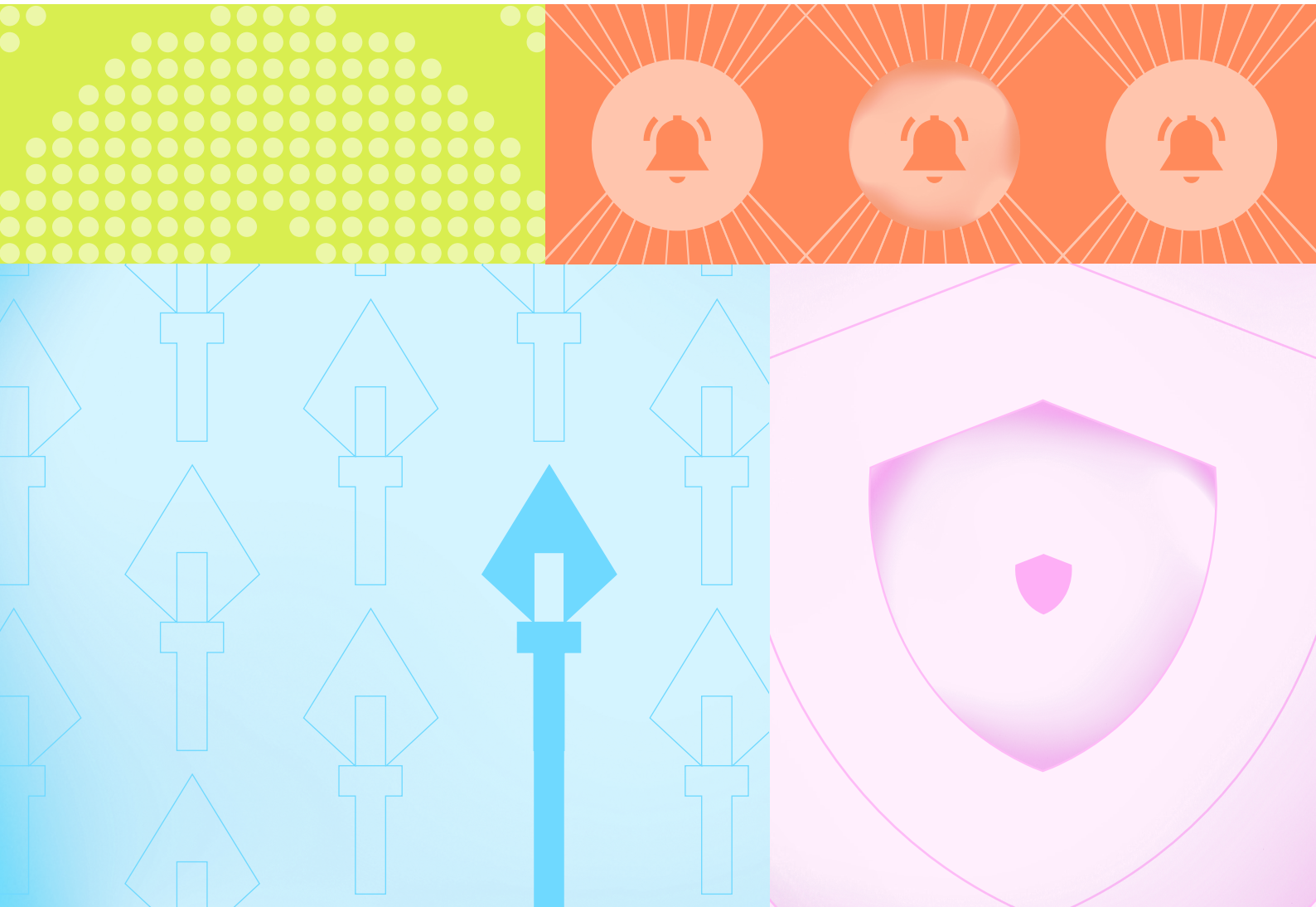


REPORT

The State of Customer Conversations 2026.



For decades, customer experience has operated inside a fixed set of constraints:



Scale limited
by headcount



Knowledge
fragmented
across systems



Improvement
cycles slowed by
human processes



Reach confined
to reactive
interactions

Customer conversations were treated as a capacity problem to contain, rather than an asset to expand.

But AI has changed the equation, and the **enterprises pulling ahead in 2026 are thinking very differently**. Their leaders have realized they can use AI not to deflect or diminish conversations, but to elevate them. They see AI as eliminating the traditional constraints placed on customer conversations.

With AI knocking down these limitations, strategic CX leaders now see conversations as drivers of brand protection, growth, and insights.

New data from PolyAI, the Agentic Dialog Platform, shows the shift is already underway: only 11% of CX leaders now see the contact center primarily as a cost center. The rest see something far more powerful emerging: a function that can operate as **The Shield**, **The Sales Spearhead**, and **The Signal Intelligence Unit**.

These three concepts represent how AI can transform customer experience into much more than a reactive support layer.

Together, they add up to the biggest opportunity for CX leaders in decades: a path to raise their organizations to the highest levels of strategic importance.

ABOUT THIS RESEARCH

PolyAI commissioned a Centiment online survey to understand the attitudes of consumers toward customer experience, voice AI, and agentic AI, as well as the attitudes and plans of CX and contact center leaders. Respondents included:

1,045 consumers ages 18 and over based in the United States.

533 CX leaders from businesses with more than 500 employees based in the United States.



PolyAI's latest research suggests that both sides of customer conversations are ready for far more than incremental improvements.

To meet expectations, CX leaders are reorganizing their organizations around three core functions:

CORE FUNCTIONS



The Shield

Protects brand, compliance, and trust.



The Sales Spearhead

Unlocks revenue in high-intent moments.



The Signal Intelligence Unit

Transforms conversations into competitive intelligence that informs product, operations, and strategy.

While the most advanced organizations are building all three simultaneously, there's no wrong place to begin. The only mistake is standing still.

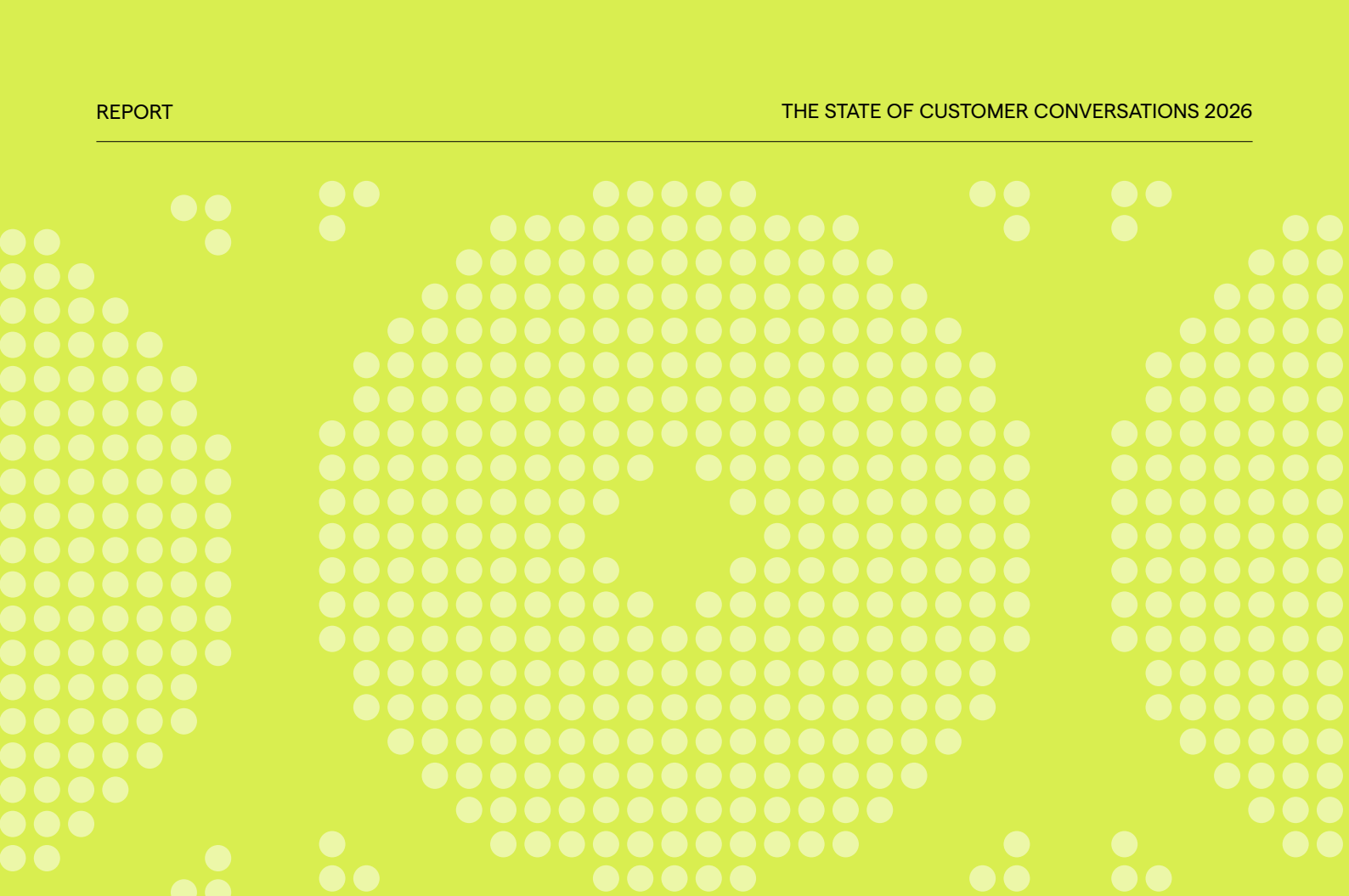
Why now?

Most AI deployed for CX was never built for real customer conversations. They were designed for text, retrofitted to voice, and capable of deflecting simple queries but not resolving complex ones.

Today's **dialog AI** is purpose-built for the full complexity of real customer conversations: holding context across turns, navigating ambiguity in real time, and actually delivering resolutions without handing off to a human.

In 2026, dialog AI has finally become available at scale for any business.





The field of operations.

Where customer expectations and executive assumptions collide.

Before you can deploy a shield, thrust a spearhead, or make sense of signals, you need to understand the field of operations.

But PolyAI's research reveals a fundamental issue with business leaders' understanding of their customers: the two sides are not fully aligned on what success in CX looks like.



Understand the confidence gap

↑ **77%**

of **CX leaders** trust human agents to get the job done without mistakes

BUT...

↓ **63.5%**

of **consumers** say agents are only half-listening

That means that although more than 3 in 4 CX leaders say they're confident in their human agents, their customers see a totally different reality on the ground:

ONLY

21%

believe human agents are always fully locked in.

WHAT'S WORSE

15%

say their conversations "feel like talking to a brick wall."

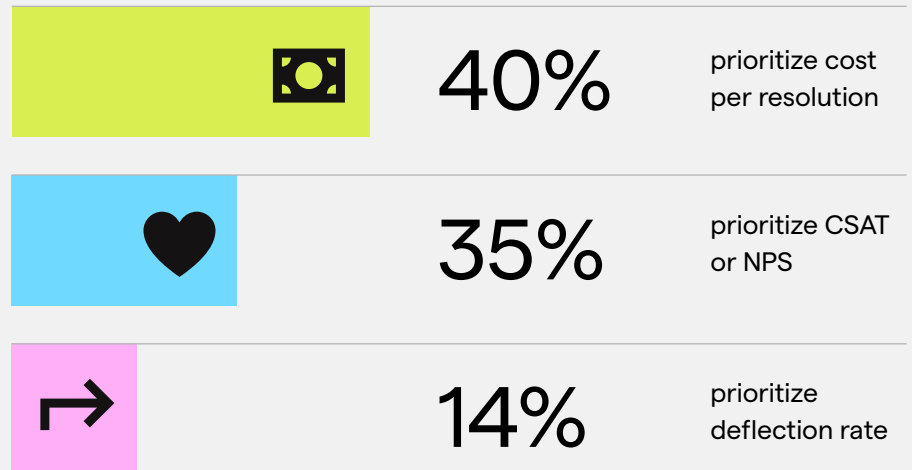
Simply put, your customers have very low confidence that your human agents are listening. This disconnect is a strategic blind spot for business leaders, and blind spots on the field rarely go unpunished.



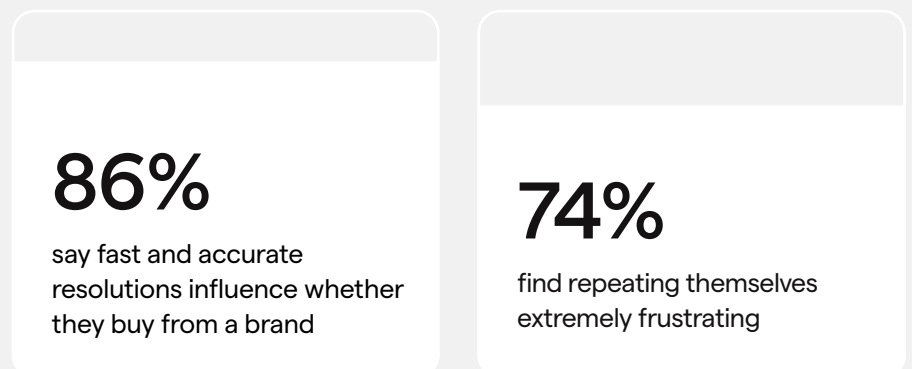
Optimize for relief, not just cost

Another area where business leaders and their customers don't see eye to eye is in evaluating outcomes.

When **CX leaders** evaluate AI success, the hierarchy is clear:



These are rational metrics, but they reflect an operational lens, and customers evaluate success very differently:



CX leaders who'll win in 2026 are those who understand that cost reduction is a byproduct of excellent resolution, not a substitute for it.

The bottom line is that understanding today's field of operations means accepting that executive assumptions and customer realities are diverging. AI has exposed that gap — and it is also the tool that can close it.





The Shield

Protecting trust at the dawn of Agentic AI



CX leaders know that every single customer conversation carries both opportunity and risk.

That's why about a quarter of CX leaders (26%) now see their contact center's main function as operating as their company's "Shield."

These leaders don't see service as just a cost center or back-office utility. For them, it's the layer protecting their company's brand, employees, and customers. Put another way, they see the contact center as the function responsible for absorbing volatility and preserving trust.

CX leaders who identify with The Shield role are disciplined. They value consistency, clarity, and loyalty.

They also know that brand reputation is slow to build and quick to lose, meaning standards cannot fluctuate depending on who answers the phone — or whether it's a human or AI.

Match the speed of escalation

Shield-minded leaders have recognized that today's customers escalate quickly.

On top of that, nearly a quarter (23%) of customers will go to social media or review sites immediately after a bad experience, and another 59% will do so if they feel the service was particularly rude.

That's the environment today's contact center operates in. There's no slow burn of dissatisfaction, just rapid escalation.

And customers who feel dismissed don't leave quietly. 65.5% admit they've "lost it" on a call, cursing or hanging up in anger.

In this quick-burn environment, there are no "routine" conversations. Every interaction needs a Shield.



Deploy AI to strengthen The Shield

When it comes to incorporating AI into The Shield, CX leaders are understandably cautious.

32%

fear AI could damage their brand

42%

are focused on reassuring their employees and customers that humans still play a central role.

That vigilance is understandable. However, the greater threat to customer conversations (according to customers themselves) is not AI, but a lack of respect for their time. In fact, signals from customers toward AI are more confident than many business leaders assume.

51%

consumers would be “delighted” if AI could handle their problems quickly, even if the AI “sounded like a toaster.”

That doesn’t sound like a demand for human warmth and empathy. It’s a demand for speed and competence.

In fact, 21% of consumers say they would rather clean a toilet than wait on hold. That means that the pain inflicted by traditional customer service is physically repulsive to a solid chunk of your base.

Summed up: today’s customers are not put off by automation; they’re put off by you wasting their time.

CX leaders looking to use their contact center as a Shield should start thinking along these lines. The question isn’t “Will AI introduce risk?” It’s “What do I risk by not using AI?”

As consumers indicate, deploying agentic AI can be a strong support for The Shield. It strengthens it by ensuring customers don’t repeat themselves, don’t wait unnecessarily, and don’t experience different standards from one conversation to the next.



Fight fatigue on the front line

The Shield, at its best, goes beyond protecting against external forces. It can also protect against internal erosion.

30% of business leaders cite inefficiency — skilled agents tied up on routine work — as a major strain on their budgets. On top of that, 32% say burnout is the primary reason they lose their highest-performing contact center employees.

When your strongest people are worn down by repetitive tasks, the quality of every conversation suffers.

Customers notice these changes. In fact, 41% say rudeness or dismissiveness is the ultimate customer service sin.

But the strain in contact centers isn't just weighing on agents. Only 24% of CX leaders say their middle management is "very prepared" to manage AI-augmented teams, with the remaining 76% acknowledging their managers need better training.

That combination of fatigued agents and underprepared managers creates uneven experiences — exactly what The Shield is meant to prevent.

How CX leaders respond to this moment will determine whether their function becomes a true source of protection or simply remains a cost to be managed down. The good news is that a solid majority of business leaders are ready to use AI in their most important customer interactions:

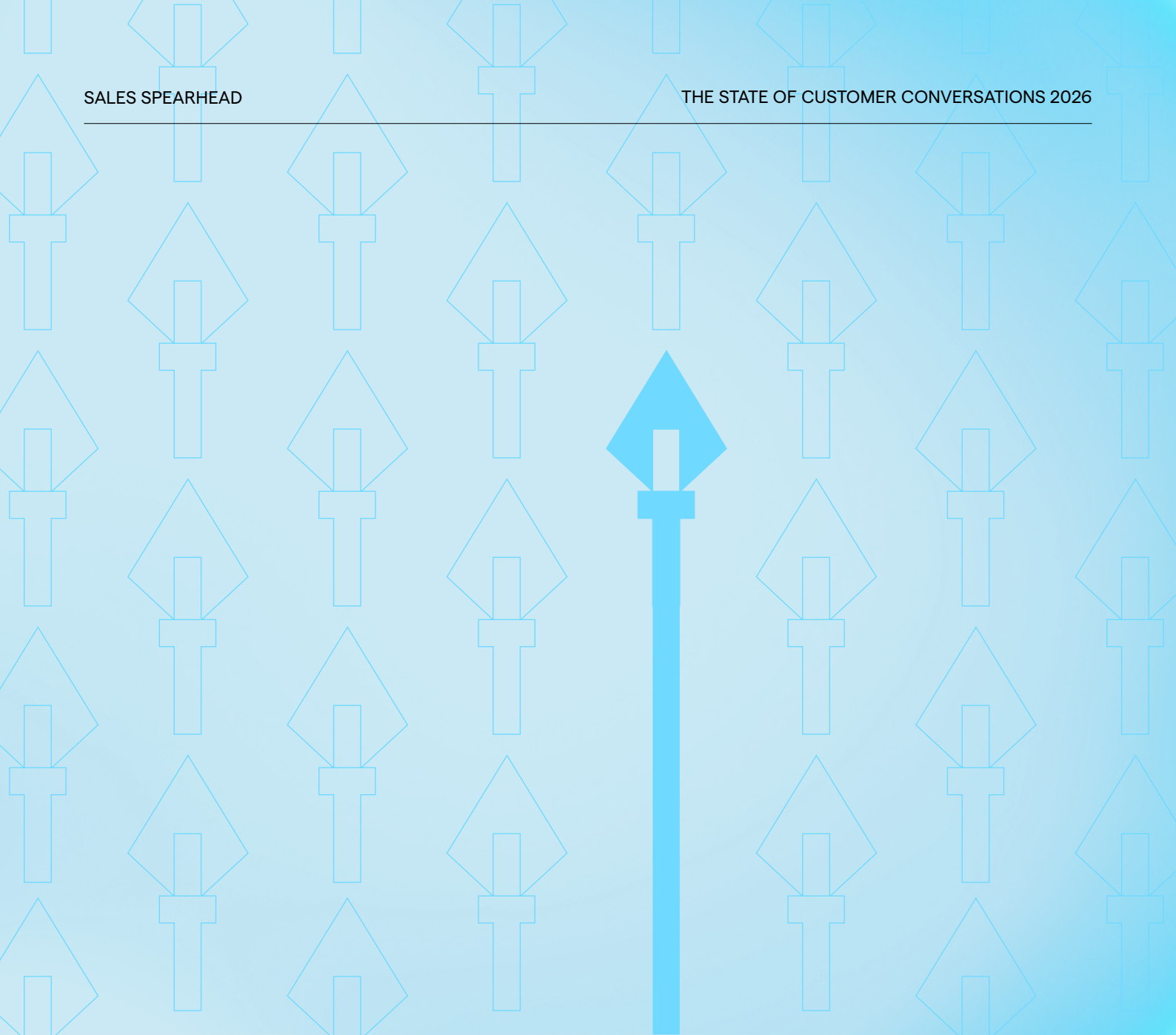
65%

of business leaders are comfortable having AI participate in difficult conversations (like bereavement claims or fraud crises).

This openness to AI can relieve some of the pressures on The Shield, because intelligently deployed AI agents absorb repetition and escalate when they need to. This protects human agents' capacity for empathy and prevents burnout, while also giving management room to breathe and plan.

All told, agentic AI doesn't delete the people holding up The Shield, it backs them up.





The Sales Spearhead

Turning conversations into growth

While The Shield protects trust, The Sales Spearhead converts it into momentum.

For too long, revenue generation and customer service were siloed in separate parts of the organization. Sales created demand while service handled problems. The contact center was simply too busy managing inbound volume to influence growth in any meaningful way.

But every customer conversation is a moment of genuine attention — and attention is hard to earn these days. When a customer calls, they're engaged: asking questions, clarifying needs, and revealing what matters to them.

What unfolds in each conversation determines whether it becomes a revenue opportunity or just another closed ticket. It all depends on how well the agent, human or AI, understands the customer's history, anticipates their needs, and responds with relevance.

This shift in perspective is already underway. Today, 25% of CX leaders say the main role their contact center plays is that of The Sales Spearhead.

Capture engagement before it fades

Customers rarely contact companies casually. They reach out because something matters: a purchase decision, a product question, a billing concern, or a pang of uncertainty. The Sales Spearhead mentality treats these conversations as strategic events that can become moments of growth.

The fact is, service quality has a massive impact on sales:

86%

of customers say fast,
accurate resolution
affects whether they buy
from a brand.



What's more, customers are increasingly willing to accept AI as the mechanism that makes speed and accuracy possible.

Customers would rather speak to an AI agent available 24/7 than wait for a business to reopen to:



CX leaders in the past would treat these as simple service interactions, but those who know the contact center can be The Sales Spearhead and see them for what they are: moments of commercial intent. And it's clear that customers are willing to complete meaningful transactions with AI if it gives them the immediate access they want.

With today's dialog AI, CX leaders can convert inbound service touchpoints into purchase opportunities — not because the business pushed a sale, but because it showed up just when the customer needed it.

Kill friction before it kills revenue

Just as conversations can create growth, they can also destroy it.

From waiting on hold to navigating phone trees to having to call back later, moments of high friction turn engagement into abandonment.

Using the contact center as a Sales Spearhead means defeating friction before it defeats your customer.

PolyAI's consumer survey data indicates openness to working with AI when it removes friction from real-world tasks, even when it comes to high-stakes moments like healthcare:

40%

would rather speak with an AI to schedule a medical appointment than wait for the practice to reopen

56%

prefer it to arrange transportation to medical appointments





The Signal Intelligence Unit

Mining insights for battlefield advantages

Every customer conversation contains information about what customers want, why they're getting in touch, and how their experience could be improved.

Most of this intelligence is lost because human systems are constrained in what they can capture, process, and retain.

The result is a structural limitation: businesses are making decisions based on a fraction of what their customers are actually telling them.

Among the roles that the contact center can play in today's environment, The Signal Intelligence Unit is the one that transforms conversations into an enterprise's advantage.



38%

Today, just over 38% of CX leaders say they see customer service primarily as The Signal Intelligence Unit of their organization.

This is significantly higher than those who view it primarily as The Shield or The Sales Spearhead. While these roles are not mutually exclusive (and the most effective contact centers take on all three), this fact reflects a growing realization: the contact center has always been one of the most information-rich environments in the enterprise, but also one of the least leveraged.

A new class of CX leaders is beginning to work differently.

They see the contact center as an early-warning system and sensor network. The Signal Intelligence Unit is where strategic opportunities and challenges appear first.



Identify your weak spots

Every day, customer conversations reveal friction in products, confusion in pricing, unmet needs, churn signals, competitive comparisons, and more. Most of that intelligence disappears the moment a ticket closes.

51%

of customers say the single 'biggest trigger' is having to repeat their issue to multiple agents

That statistic is often treated as a service annoyance, something to be minimized through training or scripting. But in reality, it's strategic feedback. Customer conversations where people have to repeat themselves signal breakdowns in transfers between channels, fragmented data systems, and where AI and human workflows aren't aligned. They highlight exactly where customers feel unseen and unheard.

When the contact center operates as The Signal Intelligence Unit, CX leaders can analyze conversations to answer questions like:

Which product lines generate the most context resets?

Does repetition correlate with churn within 30 days?

Where is repetition clustering?

Are certain customer segments more affected than others?

Dialog AI enables this shift by structuring conversational data at scale: detecting recurring themes, identifying escalation language, and linking dissatisfaction patterns to downstream outcomes like churn or reduced spend. CX leaders who use it to bolster The Signal Intelligence Unit can transform everyday complaints into strategic foresight.



Build a proactive automation strategy

Contact centers generally operate reactively, responding to issues as they arise and measuring success after the fact. The Signal Intelligence Unit operates ahead of the curve, including proactively identifying areas where automation and AI can make a positive difference.



66%

According to PolyAI's survey, 66% of consumers say they treat AI agents the same as human agents.

With this fact in mind, CX leaders should think hard about how they can leverage AI to turn signals like escalation frequency, sentiment shifts before and after transfer, containment rates, recontact rates, and more into insights like:



If AI resolves delivery updates with low recontact and stable sentiment, we should scale automation aggressively.



If billing disputes consistently escalate after automation, we should refine workflows or route high-risk cases directly to trained specialists.

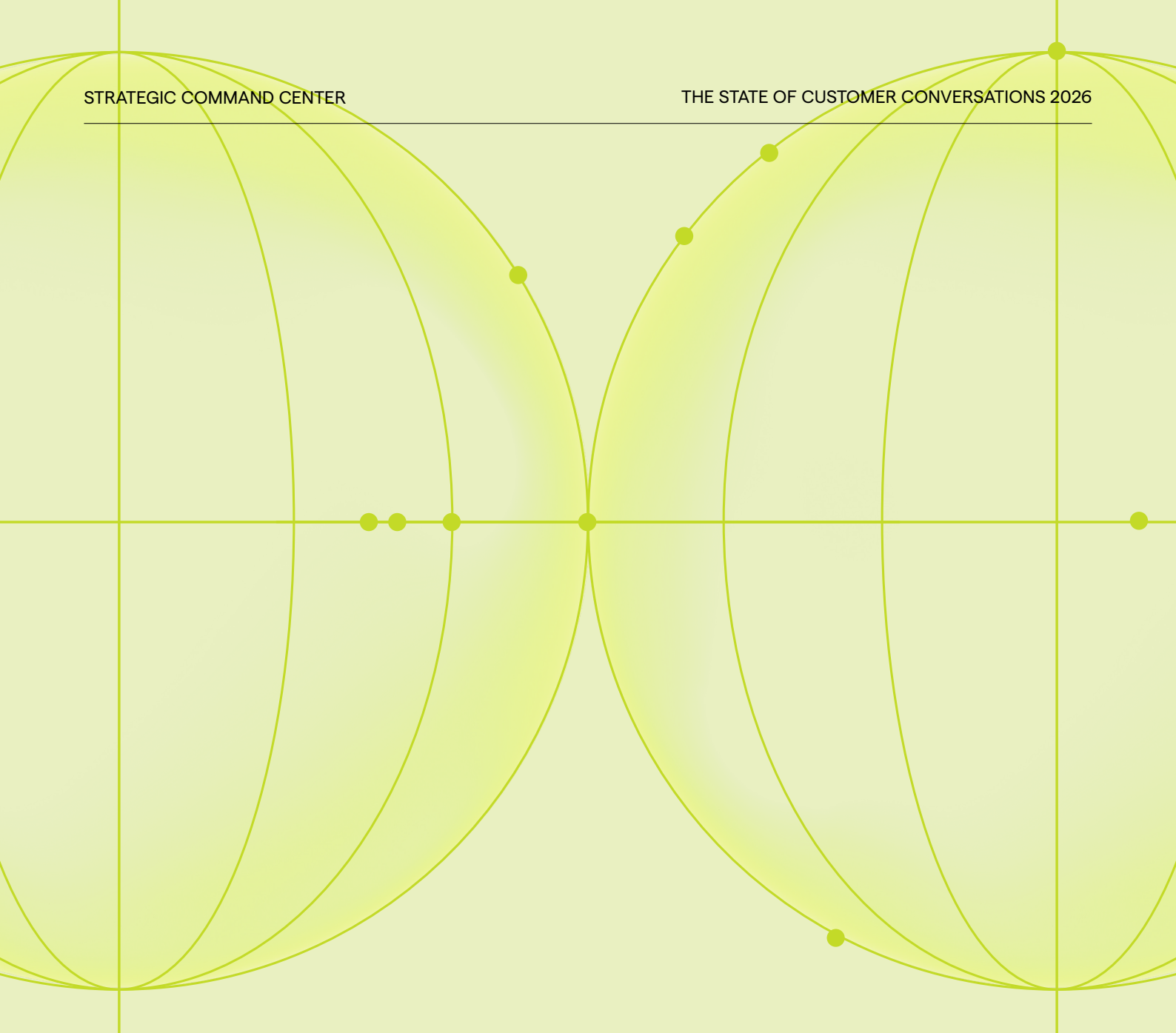


If competitor mentions increase within cancellation conversations, we need to immediately review our product or pricing strategies.

When the contact center functions as a Signal Intelligence Unit, it's no longer acting reactively or defensively. Instead, it gives CX leaders clear insight into where to proactively automate, guided by live behavioral data rather than quarterly reports.

Leaders who see the contact center as a central nervous system don't have to guess what to automate next. They know, because their customer conversations tell them.





The Strategic Command Center

The contact center is no longer just a cost center.

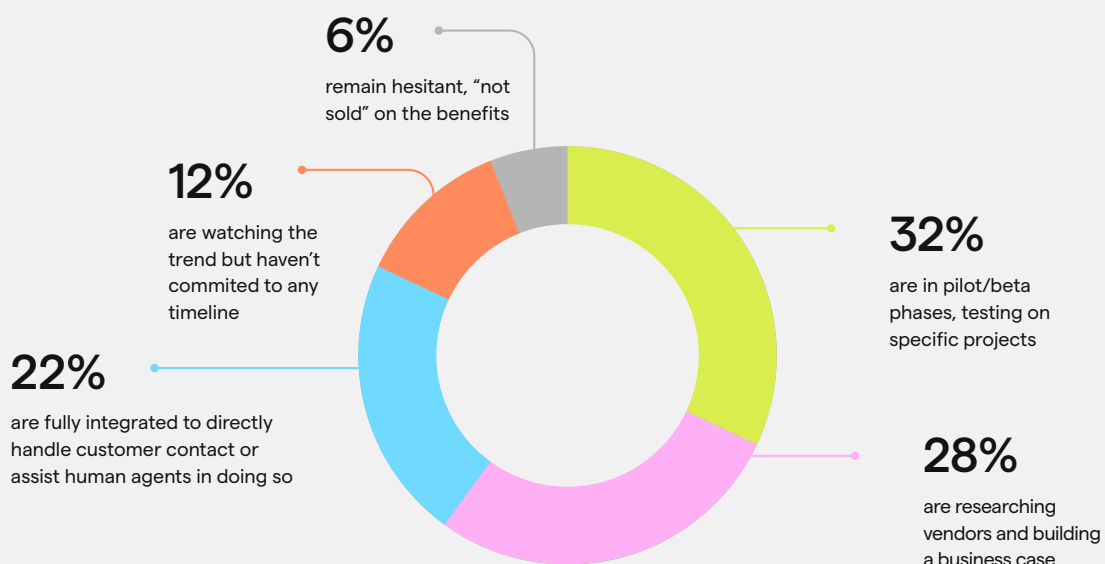


Throughout this report, we've outlined three roles that modern CX leaders are stepping into:



Each role is powerful on its own, but together, they redefine what the contact center can be, reflecting its release from the constraints that bound it for decades.

Most organizations are still early in their journey using AI agents for CX, with leaders reporting they:



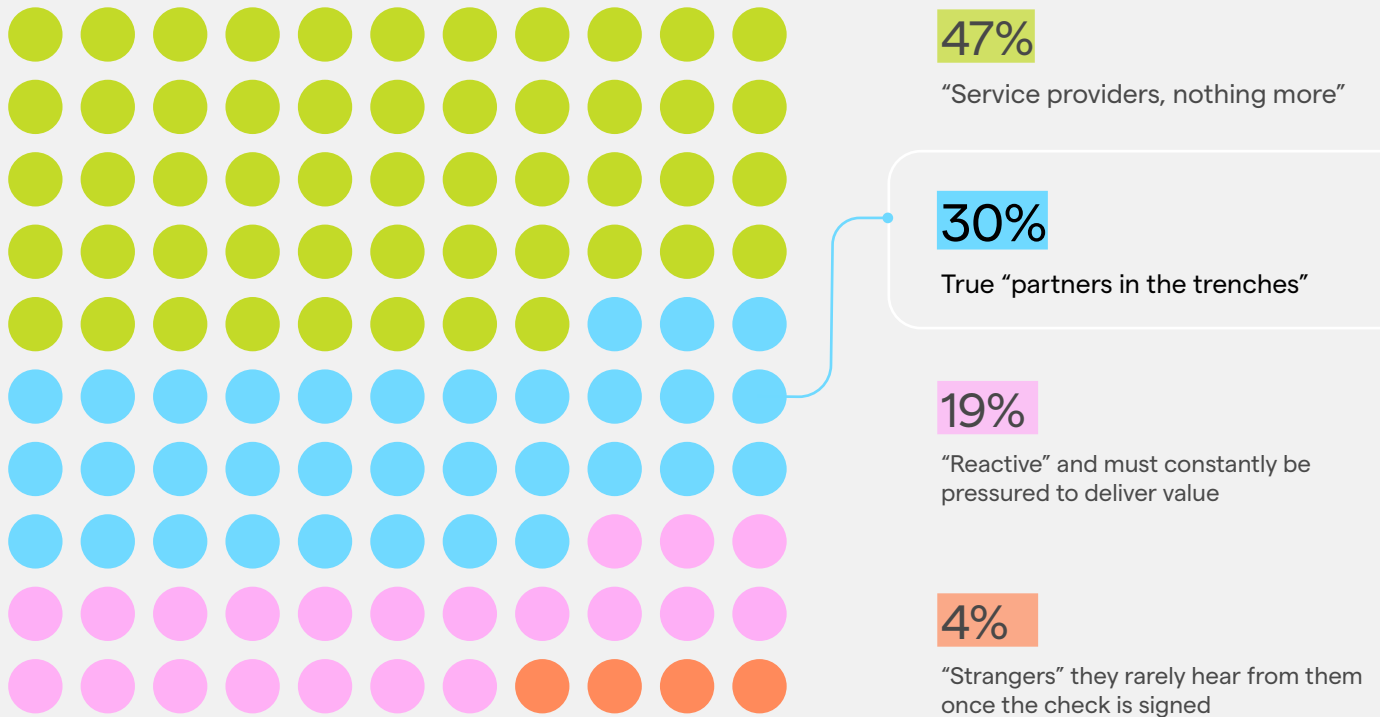
That data reflects where most organizations are now, not where today's dialog AI can take them. For the vast majority, the question is no longer whether to evolve CX, it's how to do it in ways that best serve their business, their customers, and their employees.

And increasingly, the answer depends on who you build with.



Find your allies

Only 30% of CX leaders say they see their technology vendors as true “partners in the trenches.”



For routine relationships, those dynamics might be acceptable, but transforming the contact center into a Shield, a Sales Spearhead, and a Signal Intelligence Unit is not a routine initiative. It requires allies.

According to the most recent MIT Sloan Management Review State of AI in Business report, **95% of generative AI pilots fail to deliver measurable ROI**. But the projects that do succeed are those that involve specialized external partners: vendor-led AI initiatives succeed roughly 67% of the time, compared to about 33% for internally built efforts.

In other words, the difference between experimentation and transformation often comes down to having the right people on your side.

The right partner never deploys general-purpose AI for a job it was never designed for.

They understand that AI meant to handle customer dialog must:

- Maintain context
- Handle complexity
- Integrate with systems to actually resolve conversations

CX leaders who build AI capabilities with partners they trust, allies who truly understand the strategic role customer conversations now play, will command the field.



The state of customer conversations

Customer conversations are undergoing a total transformation.

For decades, the contact center was judged by efficiency and cost-savings, but the data in this report suggests a different reality is emerging.

Customers are becoming less tolerant of friction and less concerned with whether they are speaking to a human or an AI. What matters most is whether their problem is solved quickly and competently.

At the same time, CX leaders are beginning to rethink the role of the contact center itself. No longer a resource-constrained cost center, the contact center is instead becoming an unconstrained system for engagement, growth, and intelligence.

Three shifts define the state of customer conversations in 2026:



Consistency protects trust

Customers expect every interaction to meet the same standard, regardless of channel, time of day, or who answers.



Speed shapes growth

When companies remove friction and show up the moment customers need them, conversations become opportunities instead of support tickets.



Conversations yield intelligence

Every interaction reveals where products confuse customers, where loyalty weakens, and where opportunity appears.

The contact center is fast becoming the strategic command center where customer relationships are lost or won.



Methodology

In Q1 2026, PolyAI commissioned a Centiment survey of 1,045 U.S. consumers ages 18 and up, as well as 533 business leaders at U.S. companies with more than 500 employees.

The business audience was composed of leaders who recommend, purchase, implement, or sign off on customer service and marketing technologies across C-suite (including CEOs, CIOs, COOs, CMOs), vice president, director, and manager-level roles.

The goal of this research was to understand the attitudes of consumers toward customer service, automated experiences, AI agents, dialog AI, and brand loyalty, as well as the attitudes and plans of customer experience leaders across the enterprise.



About PolyAI

PolyAI is the Agentic Dialog Platform for building the conversational enterprise, used to build, run, govern, and improve dialog agents at scale. Proven on more than a billion conversations and powered by our proprietary model Dialog-RSN-1, our agents are built for complexity, open at every layer, and sovereign by design. We serve hundreds of enterprises across 75 languages and 25 countries, including Metro Bank, Marriott, PG&E, and UniCredit.

