

When the hype fades, reality hits

Customer service in the age of AI
Edition 2 | 2026

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Customer service in the age of AI

The hype around AI in customer service has faded – but the reality may be even more compelling. In last year's study, around 95% of respondents said they were using AI in customer service. This year, that share has fallen to 54%. This sharp drop does not indicate a reversal of AI adoption; rather, it reflects a more realistic assessment of what actually constitutes AI in customer service operations.

Customer service organizations continue to grapple with persistent structural challenges. Balancing cost and quality remains a key concern, while internal organizational complexity and employee turnover have increased. As a result, AI adoption has stabilized at a more realistic level, with augmented-human setups and conversational AI dominating, while fully autonomous end-to-end applications remain rare.

AI nevertheless remains as relevant as ever for customer service. Most organizations not yet using AI are planning to implement it in the next 12 months or are very likely to do so. Their expectations focus on higher process efficiency and lower operating costs, while also aiming to improve customer satisfaction, although they are slightly less enthusiastic about what AI can really deliver than organizations already using it.

In fact, for current users, AI in customer service has exceeded expectations, with more than 50% of AI-

powered customer service operations reporting a significant or very significant impact. Response times have improved, customer satisfaction has increased and operating costs have come down. Customer feedback on AI-based interactions is also more positive than many expected, confirming that AI is no longer just a backend optimization tool but is rapidly becoming a focal point of customer interaction.

Maturity and implementation readiness remain low. Even among organizations already using AI, legacy systems and limited data quality continue to constrain broader scaling, while governance often remains unclear. The key challenge is therefore no longer whether AI works, but whether organizations can modernize their operating model and strengthen the foundations for deployment. They also need to move from isolated use cases to a new way of operating customer service.

Overall, enthusiasm for AI remains high, but the hype cycle is clearly over. Success now depends less on technology readiness and more on an organization's ability to modernize its operating model, integrate legacy systems and position customer service as either a cost center or a loyalty engine. Reality is here: organizations already using AI are seeing clear benefits, while those that delay adoption risk falling behind unless they improve their maturity now.

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1/ From hype to reality

AI adoption in customer service

The initial hype around AI in customer service – detailed in our 2025 report "Service with a silicon smile: Customer service in the age of AI" – has now given way to a more realistic phase of implementation. Following an initial phase of rapid uptake and experimentation, many organizations have moved beyond pilots toward a more consistent understanding of what actually constitutes AI in customer service operations. As a result, reported adoption has declined, reflecting a narrower definition of AI, while use cases are shifting toward more realistic, value-driven applications such as agent assist tools and conversational interfaces.

Comparing the survey results from 2024-25 with those from 2026, it is clear that the challenge profile for customer service leaders remains broadly stable. Some priorities have shifted, however. Thus, balancing cost and quality has become more important than last year, with 52 % of respondents citing it as a top concern, reflecting growing pressure on customer service operations to control costs while meeting management expectations on results. Meeting rising customer expectations and satisfaction (44 %) remains a central challenge, although it is slightly less prominent than last year. Navigating legislation and data protection requirements (38 %) also remains highly relevant. Managing internal organizational complexity (34 %) has become more important, while personalizing service for a large and diverse customer base (26 %) is slightly less prominent than last year. Other, lower-ranked challenges include handling omnichannel growth and increasing service volume, addressing high employee turnover, overcoming cultural and language barriers and integrating AI and automation.

Where do industry insiders see the solutions to these customer service challenges lying? Technology, automation and AI are the most cited solutions, as in the last survey, with 54 % of respondents highlighting them. A further 33 % support differentiated customer service based on product, segment or channel. The retail industry

is a notable exception: here, 50 % of respondents see differentiated customer service as the key solution, while technology and AI are ranked second at 36 %. At the same time, 13 % still see value in outsourcing, nearshoring or shared service centers, suggesting that business process outsourcing providers and customer service specialists may need to rethink their operating models to remain competitive.

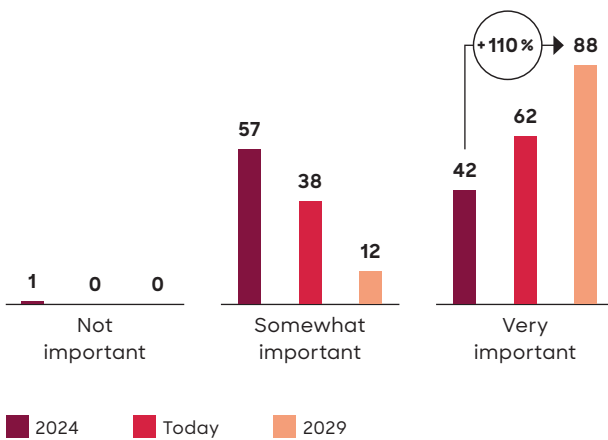
Looking more closely at technology, automation and AI as a solution, the role of human agents is clearly evolving. In 2026, 46 % of respondents say humans should be the last resort for major complaints or escalations – a sharp increase from 20 % in the previous survey, reflecting the impact of first experiences with AI in operations. At the same time, human agents remain essential for complex cases, with 28 % of respondents believing that humans are always needed for complex topics, even if routine requests can increasingly be handled by technology. Overall, this points to a shift toward a more selective and targeted use of human intervention.

At the same time, there is a more cautious view of the potential of technology and AI. The share of respondents who believe that technology can take over the majority of requests has declined from 40 % last year to 22 % in 2026, while only four percent believe that technology can fully replace human service agents. This change in perspective is driven by several challenges identified in the use of AI in customer service, including data privacy and security concerns, limitations in data quality and integration, the need to ensure the accuracy of AI-generated outputs and the high cost of implementation.

Despite these concerns, AI remains as relevant as ever for addressing today's customer service challenges. The share of respondents who consider AI very important has grown compared with the previous survey and is expected to rise further by 2029. ► **A**

AI adoption in customer service is following a typical technology hype cycle. After an initial trial phase marked

A Importance of AI in customer service [% of respondents]



Source: Potloc, Roland Berger

by rapid uptake and broad experimentation, with many pilots launched across customer service operations, AI use has declined somewhat as companies take a more realistic view of where it creates value. That trial phase is now largely complete. Many tests and pilots have concluded, while some applications have been discontinued because their financial impact was limited or scalability proved difficult. At the same time, the focus is shifting away from applications that are closer to traditional automation than true AI, and toward more realistic, value-driven use cases such as agent assist tools as well as greater use of AI at the customer interface through chatbots and voicebots.

In 2026, 54 % of companies report AI-powered customer service operations. Within that, 44 % have introduced AI-assisted support for augmented human service, while 39 % have deployed AI-driven self-service through conversational AI. More advanced applications such as

fully autonomous end-to-end service remain rare, with only 17 % of customer service operations using them, and they have yet to prove their value at scale.

China is a clear regional exception and should be treated separately from Asia overall: unlike Thailand, Singapore and Japan, which are broadly in line with the average, China shows a much more even spread across AI use cases, with end-to-end applications the most widely implemented at 35 %.

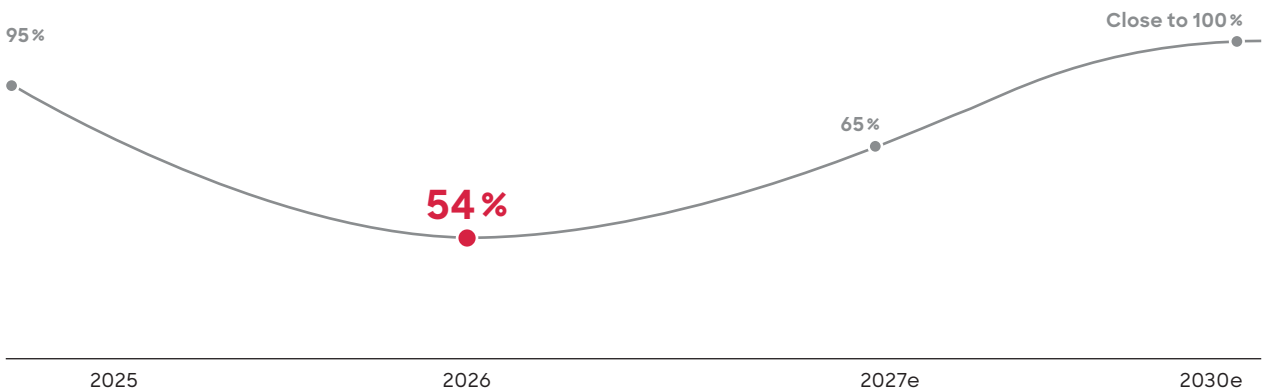
Looking ahead, broad implementation is expected across customer service operations. Some 76 % of respondents plan to implement AI within the next 12 months, 17 % are unsure and just nine percent say implementation is unlikely or not planned. Given the importance customer service leaders assign to AI, deployment close to 100 % across customer service operations appears likely within the next three years. Even so, success will depend on overcoming challenges around data privacy and data quality, while also improving output accuracy and balancing automation with a human touch in complex or sensitive cases. ►B

"The strategic inflection point is here. Organizations that treated AI as an experiment now face a hard choice: build the operating model foundations to scale, or risk falling permanently behind those that already have. The hype cycle is over. What follows is a race for execution maturity." ●●

Steffen Thiel
Partner

B The AI hype cycle in customer service¹

Adoption of AI in customer service operations



Source: Potloc, Roland Berger

The leading AI use cases in customer service today are automated status updates and agent assist tools, with both already established across a large share of AI-enabled operations. The picture is highly homogeneous across industries and geographies, with only slight differences in ranking. Planned AI implementations among operations that are not yet AI-powered broadly mirror current trends in AI application, with continued emphasis on agent assist tools, AI chatbots for customer communication,

and automated status updates for orders, payments or delays. By contrast, there is still less focus on end-to-end AI automation and other advanced AI applications until their value has been demonstrated more clearly.

At the same time, some use cases have been stopped more often than others over the past year. The most affected applications are largely centered on predicting and understanding the customer: sentiment analysis at 24 %, predictive customer needs and outreach at 21 % and personalized recommendations at 20 %. One likely reason is data quality and availability. These use cases require large volumes of high-quality labeled data, yet many companies

¹ The outlook beyond 2026 is derived based on the anticipated importance of AI in the future, combined with expert insights.

still struggle with fragmented, incomplete or biased data, which reduces model performance.

A second reason is lower accuracy and reliability. Sentiment analysis and predictive models often produce inconsistent results, especially across languages, cultures or channels, which can lead to poor recommendations or inappropriate outreach and undermine customer trust. A further challenge is integration complexity. These solutions require deep integration with customer relationship management (CRM), marketing automation

and customer data platforms, and many organizations still lack the technical readiness or resources for seamless deployment. As a result, the focus is shifting toward more proven, higher-impact use cases such as status updates and agent assist tools. This also aligns with the maturity profile of customer service organizations and with the main improvement areas they identify – particularly data accessibility and quality, legacy systems and the integration of AI. ► C

C AI use cases in customer service operations

AI use cases	Current use in 2026 [%]	Additional implementation in next 12 months
Automated status updates	57	↗
Agent assist tools	55	↗
Automated written customer communication	53	→
Direct-to-customer spoken responses	35	↗
Personalized recommendations	32	↑
Predictive customer needs	29	↑
Sentiment analysis	25	↑
Multilingual AI	20	↑

→ < 15 %

↗ > 15–20 %

↑ > 20 %

N=296

Source: Potloc, Roland Berger

2/ Impact in practice

AI influence on customer service KPIs and expectations

AI is already delivering measurable impact across the key performance indicators (KPIs) of customer service. Among operations that have implemented AI – some 54% of total respondents – improvements are visible across customer interface metrics, operational performance and workforce outcomes. Faster response times and higher customer satisfaction show that AI can strengthen the customer experience, while gains in process efficiency and lower operating costs confirm its operational value. At the same time, changes in headcount and agent roles indicate that AI is also reshaping how customer service work is organized. The strongest gains are reflected in response speed, efficiency, cost and evolving workforce roles.

Deep dive

Why AI leads to fewer staff cuts in China

China stands out as a regional exception in the workforce impact of AI. While most respondents in China report headcount reductions in the 11-20% range, no respondents report reductions above that level. Other Asian markets show even lower realized reductions. One reason is that many customer issues are already resolved digitally without agent involvement, so the baseline volume requiring human support is lower. In this context, AI acts more as a productivity lever than a replacement tool. It allows volumes to increase further and helps human-centered activities move faster, but does not necessarily displace staff. By contrast, only Europe and the Americas show headcount reductions above 20%, pointing to a more substitution-led pattern of AI adoption.

² Figures in Fast Facts refer to improvements seen in companies that use AI in their customer service operations, i.e. 54% of survey respondents. Source: Potloc, Roland Berger

CUSTOMER INTERFACE

Response time remains one of the clearest indicators of AI impact in customer service, with average times improving by 19.0% where AI is used. The strongest gains are reported in technology, media and telecommunications (TMT), where response time improves by 22.7%, followed by financial services at 20.5%. Retail, wholesale and consumer products achieve a 16.7% improvement, transportation 16.4%, while energy and utilities report the most moderate gain at 14.9%. Across industries, most organizations cluster in the 11-20% range, although TMT stands out with a higher share of respondents reporting reductions of more than 30%.

Faster response times are also translating into stronger customer outcomes. Net Promoter Scores (NPS) improve by 10.7% on average across AI-powered customer service operations. Financial services lead on this KPI with an 11.8% increase, followed by TMT at 10.7%. Retail, wholesale and consumer products reach 10.6%, energy and utilities 10.5%, while transportation stands at 9.9%. Beyond traditional service channels, AI is increasingly becoming a direct interface to customers. For 45% of AI-powered operations, AI has become a focal point of customer interaction. Adoption is particularly strong in China at 63%, with Germany and Italy also showing above-average use of AI in customer interactions. Customer acceptance is generally positive: 80% of customers react positively or very positively to AI bots, while only three percent report negative reactions. ► **D**

FAST FACTS²

19 %

Customer interface
ø improvement in
response time due to AI

10.7 %

Customer satisfaction
ø improvement in
NPS due to AI

CUSTOMER SERVICE OPERATIONS

AI is also generating meaningful gains in internal operations. Process efficiency improves by 11.5 % on average across AI-powered customer service organizations. Nearly half of respondents (47 %) report efficiency gains in the 11-20 % range, while only six percent see minimal gains of one to five percent. Financial services lead with a 13.0 % increase, followed by TMT at 12.3 %. Retail, wholesale and consumer products reach 12.0 %, transportation 11.7 %, while energy and utilities stand at 8.3 %. The results confirm that AI is delivering double-digit efficiency gains across most industries, although sector readiness still matters.

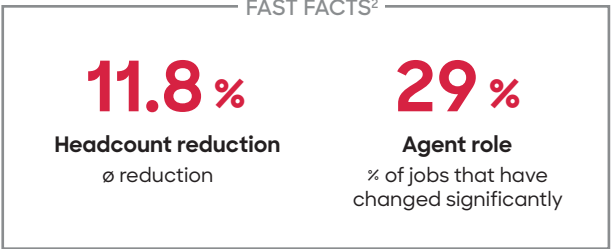
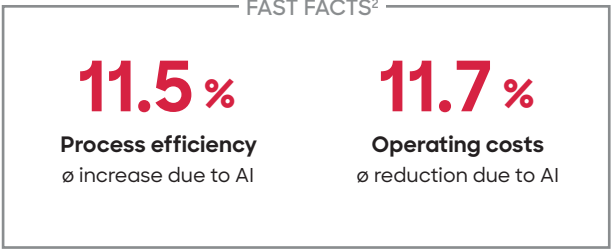
These efficiency gains are increasingly translating into lower operating costs. Across all respondents using AI, average cost reduction reaches 11.7 %. Overall, 41 % report savings in the six to ten percent range, while a further 31 % achieve reductions of 11-20 %. TMT records the strongest average cost reduction at 15.7 %, followed by financial services at 11.7 %. Retail, wholesale and consumer products reach 11.1 %, transportation 10.6 %, while energy and utilities stand at 6.3 %. Utilities are a clear outlier, with 67 % of respondents reporting only limited cost reductions of one to five percent, suggesting either less mature initiatives or stronger structural constraints. Very few companies report savings above 30 %, indicating that while double-digit reductions are increasingly common, breakthrough results remain rare.

CUSTOMER SERVICE AGENTS

AI is not only changing performance outcomes but also reshaping the workforce model of customer service. Across AI-powered operations, average headcount reduction reaches 11.8 %. Around one quarter of respondents already report headcount reductions linked to AI, most commonly in the six to ten percent range, while ten percent report reductions between 21 % and 50 %. TMT records the largest average reduction at 17.3 %, followed by energy and utilities at 14.5 %. Transportation stands at 10.2 %, financial services at 9.0 %, while retail, wholesale and consumer products reach 8.1 %.

The impact on agent roles is broader than pure headcount change, however. While large-scale job redesign remains the exception, role adaptation is becoming widespread. Some 59 % of respondents report slight changes in job profiles, with focus areas shifting while core duties remain intact. A further 29 % report significant role change, including new skills and shifted responsibilities. Only 8-15 % say roles have not changed at all, indicating that some level of change is now nearly universal.

Importantly, 96 % of employees report that their daily work experience is somewhat or significantly improved, likely driven by agent assist tools that support case resolution and make information easier to access. By contrast, organizational culture effects remain limited, with just four percent reporting weaker team spirit or culture.



The impact of AI is clearly recognized by customer service leaders who have implemented AI. AI is delivering or exceeding expectations for the vast majority of their organizations, with 43 % reporting above-expected impact and a further 52 % saying results meet expectations. This confirms that the benefits realized are not limited to isolated pilots but are being achieved at scale across live operations. ► E

WHAT NON-USERS OF AI EXPECT

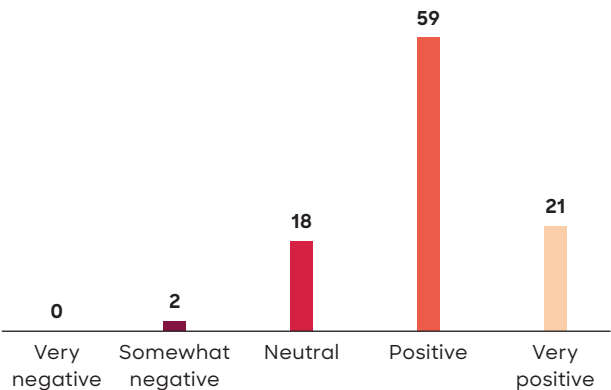
Customer service organizations that have not yet implemented AI – around 46 % of respondents in this year’s survey – were asked about the expected impact of AI if adopted in the future. Their answers broadly mirror the benefits already reported by AI-powered operations: faster response times, higher customer satisfaction, lower operating costs and stronger process efficiency. Expected

response-time improvement averages 17 %, with a small but notable share expecting gains of 31-50 % or more.

Expected headcount reduction averages 10.5 %. Most responses are concentrated in the one to ten percent range, although the average is lifted slightly by a smaller group expecting reductions of 31-50 % or more. Net Promoter Scores (NPS) are expected to improve by 8.3 %. Very few non-users of AI expect either no improvement or gains above 20 %, suggesting that outliers have limited influence on the average.

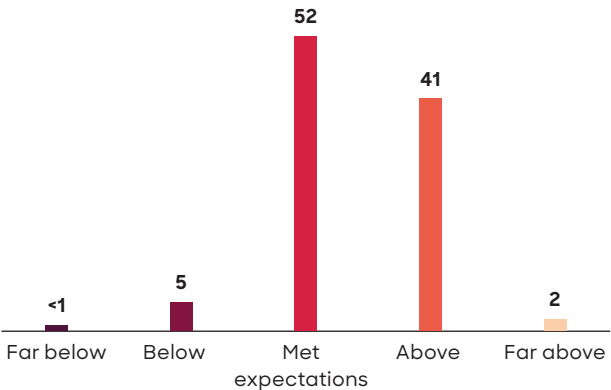
In most categories, non-users of AI expect a weaker impact than adopters actually experience, particularly in customer satisfaction and headcount reduction. Only in response time do the expectations of non-adopters slightly exceed the results of adopters. This suggests that the practical value of AI in customer service is already more tangible than many non-users assume.

D Customer acceptance of AI bots in their interactions [in %]



Source: Potloc, Roland Berger

E The impact of AI: expectations vs. reality [in %]



Source: Potloc, Roland Berger

Why some industries capture more value from AI

Industry/KPI	Response time [decrease in %]	Customer satisfaction NPS [increase in %]	Process efficiency [gain in %]	Operating costs [reduction in %]	Headcount reduction [change in %]	Agent role [significant change in %]	Using AI as a customer interface [decrease in %]
Industry average	19	11	12	12	12	29	45
Transportation	16	10	12	12	10	38	48
Technology, media & telecommunications	23	11	12	16	17	29	35
Energy & utilities	15	11	8	6	29	22	35
Retail, wholesale & consumer products	17	11	12	11	29	18	49
Financial services and insurance	21	12	13	12	29	38	52

The impact of AI differs markedly by industry. TMT and financial services show the strongest overall gains, combining faster response times, higher efficiency, lower costs and more significant shifts in agent roles. This suggests that sectors with stronger digital capabilities and higher process standardization are better positioned to scale AI effectively. Retail, wholesale and consumer products show more balanced improvements,

with the highest share of operations using AI as a customer interface. By contrast, energy and utilities lag behind on several KPIs, recording the lowest gains in cost reduction and process efficiency as well as more limited workforce transformation. The findings underline that AI adoption alone does not determine outcomes. Data readiness, operating model maturity and execution capability remain critical differentiators.

Source: Potloc, Roland Berger

3/ Readiness in focus

Maturity and barriers to scaling AI

Readiness is now a central issue in customer service. As AI adoption expands and early use cases deliver results, the next challenge is no longer whether AI can create value, but whether organizations have the maturity required to deploy it more broadly. In this chapter, we therefore examine the current level of readiness, the main barriers to scaling AI and the implications for future customer service operations.

Overall, the maturity of customer service organizations remains moderate rather than advanced. Across most AI and data-driven capabilities, respondents describe themselves as only "somewhat ready". High readiness is limited to a small number of areas, while clear weaknesses remain in parts of the operating model and in some enabling capabilities. The current maturity picture suggests that progress has been made, but many organizations still lack the foundations required for broader deployment. ► **F**

Comparing firms with AI-powered customer service operations with those not using AI reveals a clear readiness gap in favor of adopters. AI users consistently report higher levels of readiness across all digital and data-driven capabilities covered by the survey. They report slightly higher readiness in access to high-quality, diverse, up-to-date data, although the majority in both groups still describe themselves as only "somewhat ready", indicating

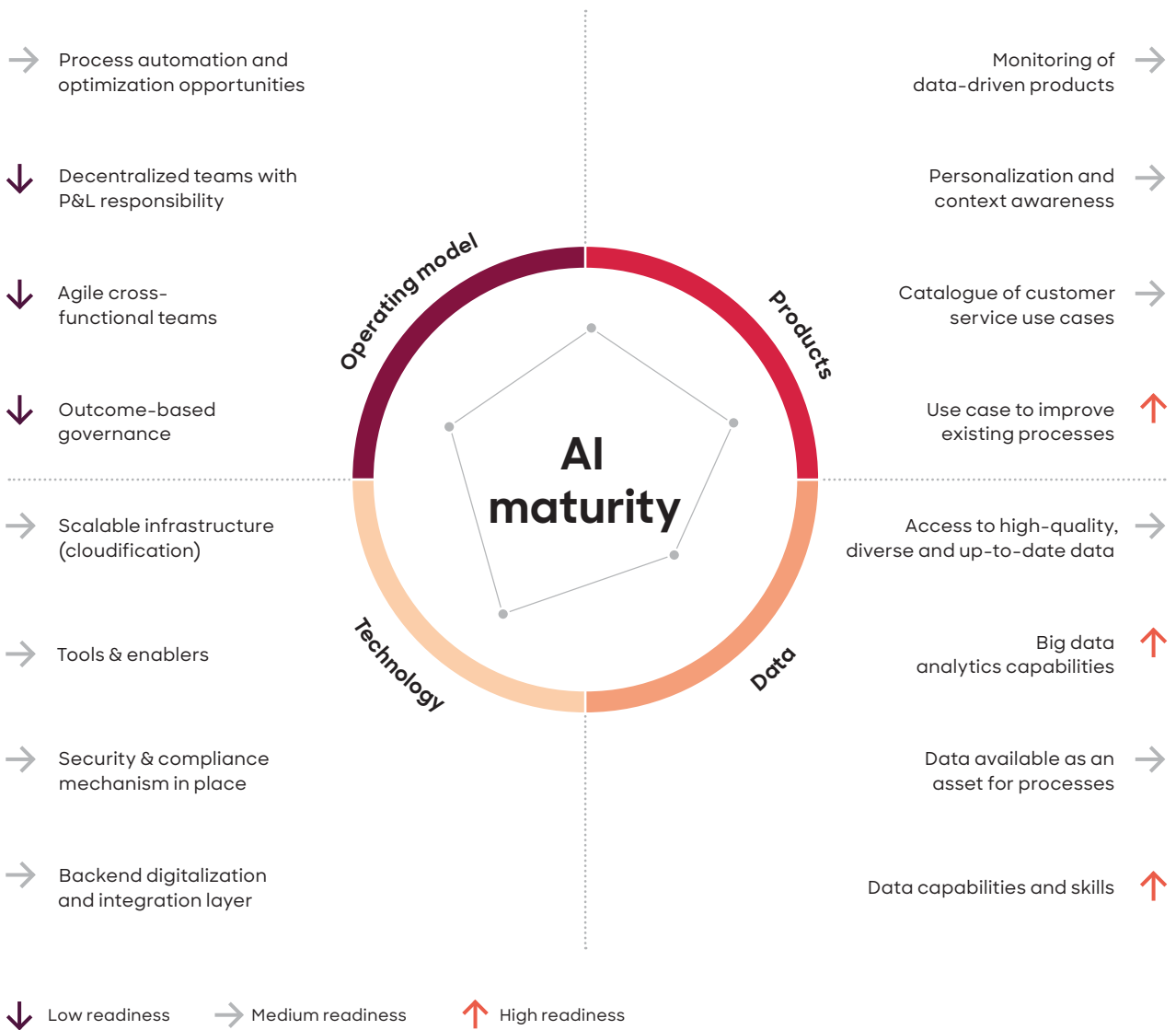
room for improvement. AI users are also more advanced in personalization and context awareness, while most organizations are still not fully mature in these areas. In user experience and intelligent routing, adopters again lead the field. They are also more likely to leverage big data analytics for customer insights and are ahead in process automation and intelligent workflows. In addition, AI users report stronger readiness in data availability and quality control and are more confident in their data protection and security capabilities.

Overall, AI adoption is correlated with greater digital maturity, particularly in personalization, automation and data analytics. At the same time, even among AI users, only about a quarter of respondents feel "fully ready" in any given area, highlighting ongoing challenges in scaling and optimizing AI-driven customer service.

The maturity picture also differs by industry. TMT is the clear first mover, with the highest maturity across nearly all AI and data-driven criteria. Financial services and CPG, retail and wholesale are adopters: they have made strong progress in implementing AI and digital capabilities, but still have gaps in data quality, agile ways of working and advanced analytics compared with TMT. Transportation, energy and utilities are the laggards, with the lowest "fully ready" scores and foundational gaps across most criteria.

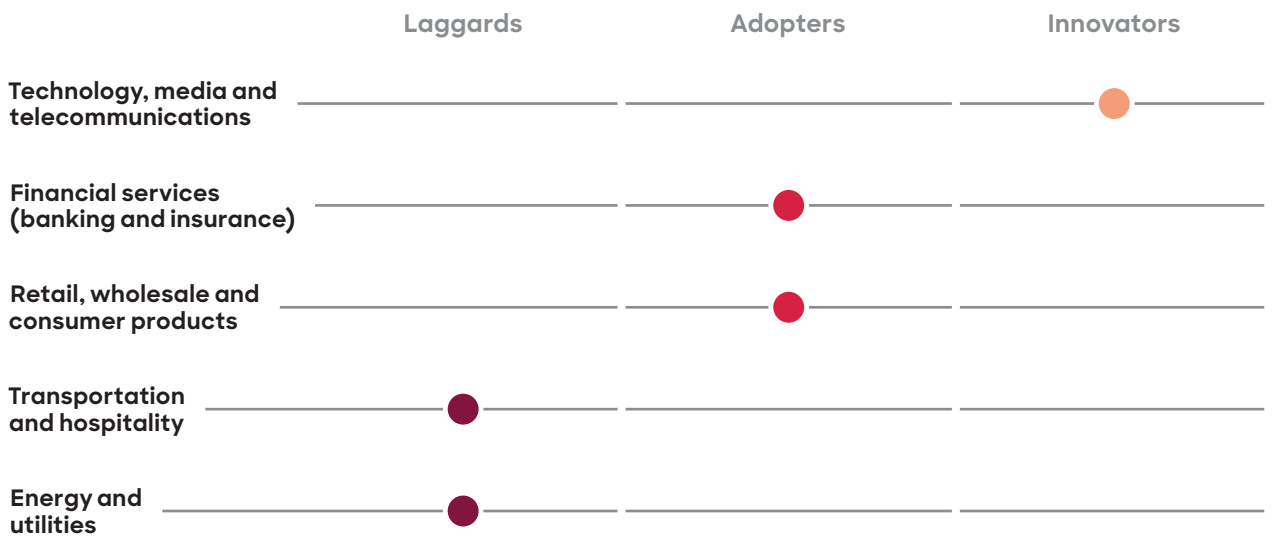
► **G**

F Maturity of customer service organizations



Source: Potloc, Roland Berger

G AI maturity differs sharply by industry



Source: Potloc, Roland Berger

● "The core strategic challenge for customer service organizations is no longer technology readiness. It is the ability to move from isolated AI use cases to a fully redesigned operating model, one built around agility, integrated data and governance structures that can sustain AI at scale."

Fabian Huhle
Senior Partner

HURDLES TO MATURITY & IMPLEMENTATION READINESS

The most significant challenge for customer service leaders already using AI is legacy systems and the complexity of integration, cited by 46 % of AI users compared with 39 % overall. This highlights that integration with existing IT infrastructure remains a major barrier even for organizations that have already adopted AI. Risks associated with AI are also a top concern (32 % of AI users vs. 35 % overall), indicating that perceived risks remain high even among experienced adopters. Budget restraints (20 % for AI users vs. 33 % in total) are less of an issue for AI users than for non-users, while management hesitation (27 % vs. 20 %) is more pronounced among AI users, suggesting that financial and leadership challenges intensify as organizations move from pilot programs to scale. By contrast, fewer AI users report lacking needed capabilities (13 % vs. 6 %) or customer readiness (10 % vs. 11 %), implying that these are less significant barriers

once AI is in use. Only four percent of non-users and no AI users say they do not see the value in AI. Overall, the main barriers to scaling AI are now less about seeing the value of technology and more about the practical conditions required to deploy it at scale: integration, governance and organizational readiness.

The overall year-on-year picture adds another perspective. Compared with 2025, the most striking shift is the emergence of barriers that were barely visible or not cited at all last year: budget restraints, AI-related risks, legacy systems and internal processes now feature prominently as organizations move from experimentation to implementation. This suggests that while early pilots could often be funded and managed within existing structures, scaling AI across customer service exposes the real constraints – integration with complex system landscapes, unresolved governance questions and operating models that have not yet adapted to AI-enabled ways of working. ►H

- "Customer service is at a strategic crossroads.
- Organizations that have moved beyond pilots are already realizing that AI is not just an efficiency lever. It is reshaping the entire service proposition, from how value is delivered to how customer loyalty is built. The question is no longer whether AI works. It is whether your organization is designed to capture what it makes possible."

Simone Schatto
Director

H Constraints on scaling AI

Management expectations & perceived value

	2026	2025 vs. 2026
Management has unrealistic expectations of what AI can do in customer service	20%	↓ -16%
We currently do not see the value of implementing AI	4%	↗ +2%
Budget restraints	33%	↑ +33%

Regulatory & market

	2026	2025 vs. 2026
Legislation on the use of AI is too cumbersome for investing at the moment	18%	↘ -8%
Too many different solution providers and no industry standard to adhere to	9%	↓ -17%
Risk associated with AI (reputational damage, ethical issues)	35%	↑ +35%

Customer acceptance

	2026	2025 vs. 2026
Management has unrealistic expectations of what AI can do in customer service	11%	↘ -7%

→ Neutral ↗ Slight increase ↘ Slight decrease ↑ High increase ↓ High decrease

Source: Potloc, Roland Berger

Technical limitations

	2026	2025 vs. 2026
Legacy systems and related complexity	39 %	↑ +39 %
AI agents are not yet able to meet our requirements	6 %	→ 0 %
AI supporting tools are too inaccurate for use in real customer service settings	18 %	↗ +6 %

Organizational readiness

	2026	2025 vs. 2026
Lack of capabilities and competencies for implementing AI solutions currently	13 %	↗ +2 %
No overview of all possible cases and structured solutions	8 %	↓ -10 %
Current internal processes and structures make AI difficult to implement & use	16 %	↑ +16 %

Note: Figures refer to all respondents (AI users and non-users)

4/ The next phase

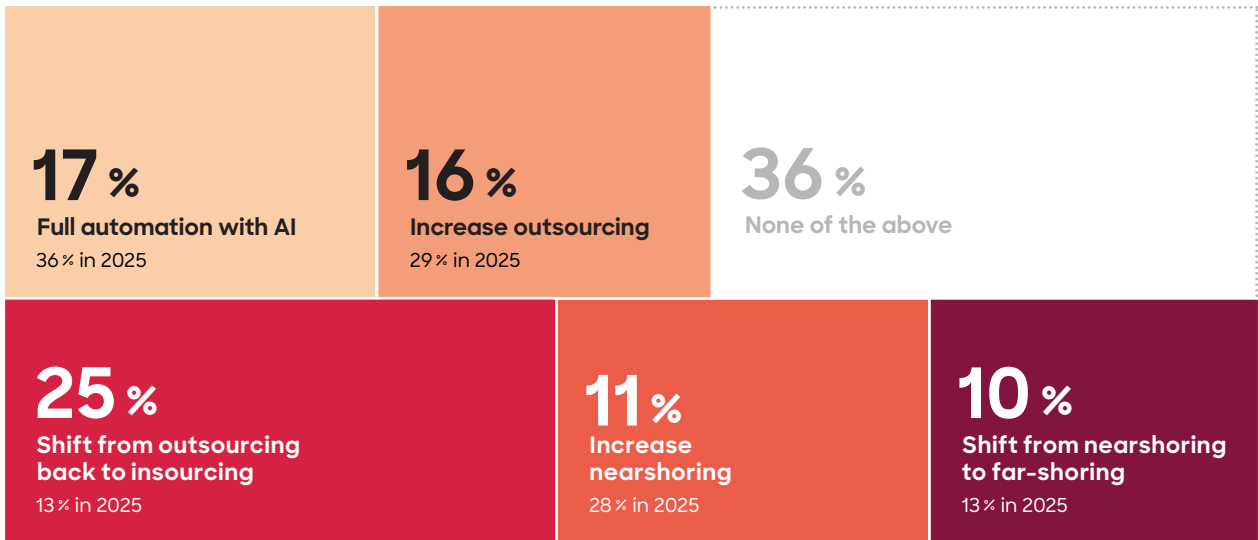
Future operating models for customer service

The next phase of AI in customer service will be shaped not only by technology, but by the operating models that organizations choose to build around it. As early experimentation gives way to broader implementation, companies are reassessing sourcing models and automation ambitions, while reconsidering the balance between control and customer experience.

The survey results show a fragmented picture of future operating models. When presented with a list of possible operating models, more than a third of respondents (36 %) chose "none of the above". This indicates that many organizations are not planning major structural changes in their customer service operations and are likely to keep

customer service in-house while continuing to explore AI within their existing remit of responsibility. The most common specific move is insourcing, with one quarter of respondents planning to bring customer service back in-house. Full automation of customer service operations on a large scale is a priority for 17 %, while 16 % plan to increase outsourcing. An increase in nearshoring (moving services closer to home) is planned by 11 %, while ten percent are considering a shift from nearshoring to far-shoring (moving services further away, often for cost reasons). Overall, the results suggest that some organizations are changing sourcing models, while the largest group is prioritizing direct control and stability. ►

Future operating models for customer service



Source: Potloc, Roland Berger

Compared with 2025, ambitions have become more selective and more realistic. The share of companies planning to almost fully automate customer service has fallen sharply from 36 % to 17 %. The proportion planning to increase outsourcing has also declined from 29 % to 16 %, while the share planning to move back from outsourcing to insourcing has nearly doubled from 13 % to 25 %. This points to a more cautious approach to large-scale automation and a stronger preference among many organizations to retain or rebuild capabilities in-house. There is therefore no single best operating model emerging from the data. The right choice depends on each company's customer service ambition and operating maturity, from the role customer service plays to the scale and geographic footprint of the organization.

THREE MISSIONS FOR THE NEXT PHASE

Three missions emerge for organizations seeking to become customer-centric and AI-powered:

- **Mission 1:** Focus on customer-centric AI journeys

Organizations need to redesign processes so that AI-driven efficiency gains do not come at the expense of response time or customer satisfaction, particularly in complex multichannel environments. They should use AI as a frontline service channel while maintaining a strong human touch for high-value or complex interactions. They also need to monitor customer acceptance and feedback so that digital transformation delivers measurable improvements in NPS and operational KPIs.

- **Mission 2:** Redesign the customer service operating model for agility and resilience

Organizations should reevaluate the mix of insourcing, outsourcing, automation and location strategy to ensure flexibility and control, reflecting the shift away from full automation and increased insourcing. They need to build modular service delivery structures that can adapt

quickly to changing customer needs and technology advancements. Clear governance and agile ways of working are also required to accelerate decision-making and support continuous improvement in customer service operations.

- **Mission 3:** Accelerate maturity for successful deployment and scalability

Organizations should prioritize investments in process automation and big data analytics to move from "somewhat ready" to "fully ready" across key capabilities. They must address integration challenges with legacy systems and ensure access to high-quality, up-to-date data to enable advanced AI and personalization. They also need to build agile teams to drive continuous digital transformation and customer journey orchestration.

● "The transformation of
● customer service roles is not a workforce story. It is a strategic one! As AI absorbs routine interactions, organizations must deliberately redesign what human expertise means in a service context, repositioning employees as the holders of judgment, empathy and complexity management that no model can fully replicate (yet)."

Maryna Finkelshteyn
Partner

CASE STUDY

Transforming customer service with AI for a global consumer and industrial product company

Challenge

A leading multinational company with a broad portfolio of consumer and industrial products faced high operating costs and inconsistent service levels across its customer service function. Legacy processes and fragmented technology limited efficiency and reduced the company's ability to scale digital and AI-driven improvements.

Solution

We applied our structured transformation approach across four pillars:

1. Roland Berger Customer Service AI Value Finder

We analyzed and benchmarked customer service performance, customer centricity and the technology stack. On that basis, we identified and prioritized the most valuable AI application fields, covering both qualitative and quantitative sources of value, including Customer Lifetime Value (CLV), Net Promoter Score (NPS), First Contact Resolution (FCR) and Average Handling Time (AHT).

2. Customer journey transformation

We designed future AI-powered customer journeys and optimized service offerings accordingly. New digital journeys were piloted and iterated, ensuring that each journey was prioritized for value and that friction points were systematically addressed.

3. Target operating model transformation

We developed a holistic AI initiative blueprint and derived the required organizational changes, role specifications and interfaces. We also assessed the financial implications and supported employees in adapting to new ways of working.

4. Implementation and scaling

We drove the agile implementation of AI initiatives, established AI governance and harmonized systems and reporting structures. This ensured sustainable, company-wide use of AI solutions with global consistency and local flexibility.

Result

The transformation achieved a reduction of more than 45% in operating costs and increased service levels by ten percentage points. At the same time, it established a scalable, future-ready customer service model that uses AI to improve efficiency while strengthening the customer experience.

5/ Recommendation

AI readiness evaluation and transformation

When the hype fades, where does value actually remain? This study suggests a clear answer: value remains with those organizations that can turn AI adoption in customer service into measurable financial impact, not just operational improvement. While adoption is widespread and already delivers clear benefits, most organizations are still only "somewhat ready" to fully capture that value. At the same time, AI is set to transform customer service far beyond anything observed to date. However, current reality still falls short of this potential. This gap underscores the urgency: organizations must now accelerate the meaningful, value-driven adoption of AI to fully realize its impact.

This study's findings reinforce that there is an AI value gap. The gap between operational improvements and financial impact persists due to challenges in integration and data quality, as well as in scaling advanced use cases.

Our results show that only a minority of companies are "fully ready" across key digital and data-driven capabilities. This calls for a shift from isolated pilots to engineered, system-wide transformation. To close the

gap, organizations must focus on end-to-end integration and continuous upskilling, supported by agile operating models. Only then can they turn AI potential into bankable P&L impact.

WHERE DO YOU STAND?

The client in our case study is on the path to success because it analyzed the potential and costs diligently and defined a holistic AI path for the future of customer service. Roland Berger's Customer Service AI Value Finder supports this process in a structured way by (1) analyzing how AI is currently used within your customer service operations, how it supports or impacts your customer service performance and how non-AI areas perform, and (2) benchmarking your organization against AI leaders in customer service to identify high-value AI applications and the corresponding value they can bring to your operations and customers.

Contact us to assess your current readiness – and define the right path to value that can outlive the hype.

This study is based on research carried out by Roland Berger and Potloc between November 2025 and March 2026. Together with the previous year's survey, the research covers more than 1,100 non-overlapping participants across the two survey waves. The 2026 sample had more than 550 participants, including both heads of customer service departments or sole decision-makers for the customer service function (51 % of respondents) and co-heads of the department or regional, divisional or functional leaders involved in decision-making processes (85 %). In total, the respondents represent more than 210,000 employees in customer service departments. Additionally, the report contains insights from interviews with customer service leaders that we conducted in order to interpret and validate the survey findings. The respondents were from the following clusters of industries: consumer packaged goods (CPG) and retail, including wholesale and consumer products; financial services and insurance, including banking and asset management; utilities such as energy and water; technology, media and telecommunications (TMT); and transportation, including railroad, airport, aviation and maritime operations.

Respondents came from a broad range of key geographies: the Americas (including the United States and Brazil; total respondents: 150), Europe (including Germany, Italy, France and the United Kingdom; total respondents: 200) and Asia (including China, Singapore, Japan and Thailand; total respondents: 200). They were employed at a wide variety of companies in terms of size, from small and medium-sized enterprises (SMEs; minimum headcount: 250) to large global corporations. Some 64 % were from companies with more than 500 employees. The customer service teams led by our respondents covered the entire spectrum, from small teams with fewer than 25 full-time equivalents (FTEs) to very large teams with more than 1,000; that said, 40 % had teams of up to 50 FTEs, 28 % had teams of 50-100 FTEs and around one third had teams of more than 100 FTEs. Respondents led departments that provided business-to-consumer (B2C) services, business-to-business (B2B) services, or both.

Credits

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FURTHER READINGS



The AI Value Gap

Why AI deployment is outpacing value realization – and how organizations can close the gap (2026)



Service with a silicon smile

Customer service in the age of AI (2025)

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POTLOC is a pioneering research technology company, partnering with top consulting firms worldwide to help them deliver stronger recommendations through faster access to better insights. Central to Potloc's methodology is an unwavering commitment to data quality, powered end-to-end by AI – from smarter survey design, to more efficient sampling that reaches any niche with remarkable precision, to deeper, faster analysis. It all converges in a dynamic, intuitive dashboard where the best raw data is transformed into impactful analysis for more informed strategic decisions. With offices in Montreal, New York, London, and Dubai, Potloc delivers premium support that transcends expectations – paving the way for resounding success. Learn more at Potloc.com



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