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An AI-first business of Pronix Inc.

PLAYBOOK · PNX-PBK-447

Contact center modernization: from IVR to conversational AI

A step-by-step migration model for retiring legacy IVR and moving to conversational AI without breaking CX. Covers platform selection, data readiness, integrations, agent experience, QA and cutover — proven across NICE, Genesys, Amazon Connect, Kore.ai and Five9 estates.

PREPARED FOR

VP Contact Center, Head of CX, CX Platform Owner, CIO

PREPARED BY

pronix.ai CX Engineering, Contact Center AI architects

EDITION

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STRATEGY · IMPLEMENTATION · TALENT pronix.ai/resources

EXECUTIVE SUMMARY

Contact center modernization: from IVR to conversational AI

A step-by-step migration model for retiring legacy IVR and moving to conversational AI without breaking CX. Covers platform selection, data readiness, integrations, agent experience, QA and cutover — proven across NICE, Genesys, Amazon Connect, Kore.ai and Five9 estates.

35-55%

Typical containment lift with conversational AI vs legacy IVR

20-30%

AHT reduction with agent assist

90 days

Median time to live on Amazon Connect for our clients

What you'll take away

- How to sequence a multi-region IVR-to-conversational-AI migration in phases
- The 4-question platform decision tree (Genesys / NICE / Amazon Connect / Kore.ai / Five9 / Salesforce Agentforce)
- Data readiness — knowledge, CRM, entitlement and identity — before you go live
- Agent experience patterns that make agents faster, not more distracted
- Automated QA and containment SLOs that survive board scrutiny
- A cutover checklist that keeps SLAs green during the switch

Audience: VP Contact Center, Head of CX, CX Platform Owner, CIO

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03	Data & knowledge readiness	Knowledge structure, retrieval evaluation, CRM entitlements and identity resolution — the 4 pre-conditions to conversati
04	Conversational design	Intent boundaries, disambiguation, containment budgets, escalation patterns, voice-first vs chat-first choices.
05	Agent experience	Assist, next-best-action, knowledge, real-time coaching — designed to reduce cognitive load, not add to it.
06	Automated QA and analytics	100% coverage QA, calibration workflows, agent coaching, containment vs CSAT-proxy SLOs.
07	Cutover playbook	Traffic ramp, fallback paths, SLO gates, war-room protocol — how to keep CSAT green during switch.

SECTION 01

Why IVR replacement fails

Wrong sequence, wrong platform, wrong data. The 5 patterns behind failed migrations.

In our engagements, the practical work in this section usually breaks down into three deliverables: how to sequence a multi-region ivr-to-conversational-ai migration in phases; the 4-question platform decision tree (genesys / nice / amazon connect / kore.ai / five9 / salesforce agentforce).

Enterprise outcomes here come from production discipline, not slideware. Named owners, shipped guardrails, evaluation harnesses in CI and instrumented unit economics turn a promising pilot into a portfolio the board is willing to fund again next year.

SECTION 02

The platform decision tree

A 4-question decision tree covering Amazon Connect, Genesys Cloud CX, NICE CXone, Microsoft Dynamics 365 CCaaS, Five9, Salesforce Agentforce, Google CCAI and Kore.ai.

In our engagements, the practical work in this section usually breaks down into three deliverables: the 4-question platform decision tree (genesys / nice / amazon connect / kore.ai / five9 / salesforce agentforce).

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WHAT GOOD LOOKS LIKE

The 4-question platform decision tree (Genesys / NICE / Amazon Connect / Kore.ai / Five9 / Salesforce Agentforce)

SECTION 03

Data & knowledge readiness

Knowledge structure, retrieval evaluation, CRM entitlements and identity resolution — the 4 pre-conditions to conversational AI.

In our engagements, the practical work in this section usually breaks down into three deliverables: data readiness — knowledge, crm, entitlement and identity — before you go live.

Enterprise outcomes here come from production discipline, not slideware. Named owners, shipped guardrails, evaluation harnesses in CI and instrumented unit economics turn a promising pilot into a portfolio the board is willing to fund again next year.

SECTION 04

Conversational design

Intent boundaries, disambiguation, containment budgets, escalation patterns, voice-first vs chat-first choices.

In our engagements, the practical work in this section usually breaks down into three deliverables: how to sequence a multi-region ivr-to-conversational-ai migration in phases.

Treat this as a reference, not a recipe. The layer boundaries matter more than the specific products you pick — a clean seam between orchestration, tools, memory and evaluation is what lets you swap providers as pricing, model quality and regulatory posture shift over the next 18 months.

WHAT GOOD LOOKS LIKE

Agent experience patterns that make agents faster, not more distracted

SECTION 05

Agent experience

Assist, next-best-action, knowledge, real-time coaching — designed to reduce cognitive load, not add to it.

In our engagements, the practical work in this section usually breaks down into three deliverables: agent experience patterns that make agents faster, not more distracted.

Enterprise outcomes here come from production discipline, not slideware. Named owners, shipped guardrails, evaluation harnesses in CI and instrumented unit economics turn a promising pilot into a portfolio the board is willing to fund again next year.

SECTION 06

Automated QA and analytics

100% coverage QA, calibration workflows, agent coaching, containment vs CSAT-proxy SLOs.

In our engagements, the practical work in this section usually breaks down into three deliverables: automated qa and containment slos that survive board scrutiny.

Evaluation is engineering, not vibes. Curate golden sets that reflect real traffic distributions, run them in CI on every model or prompt change, and hold the line on task success rate, hallucination bounds and cost per successful resolution — not just aggregate accuracy.

WHAT GOOD LOOKS LIKE

A cutover checklist that keeps SLAs green during the switch

SECTION 07

Cutover playbook

Traffic ramp, fallback paths, SLO gates, war-room protocol — how to keep CSAT green during switch.

In our engagements, the practical work in this section usually breaks down into three deliverables: a cutover checklist that keeps slas green during the switch.

Cutover risk lives in the seams — telephony, CRM, workforce management and reporting. We stage every migration behind a dual-run window, prove parity with production traffic, and only then flip the DNS or SIP trunks. Rollback is a documented procedure, not a hope.

FREQUENTLY ASKED

Questions from enterprise buyers

Which platform do you recommend?

We're platform-independent — the right answer depends on incumbent contracts, CRM alignment, region, and regulated-industry constraints. The playbook contains a 4-question decision tree that lands you on a shortlist of 2.

Can we phase this if we run 30+ contact centers?

Yes — the phasing model is designed exactly for multi-BU and multi-region estates. Chapter 7 covers wave selection, blast radius, and centralized-vs-federated design.

How is Kore.ai used in this?

As a conversational AI and agentic layer that sits above the CCaaS, delivering voice AI, chat, agent assist, knowledge and automated QA across every platform we implement.

TURN THIS INTO A DECISION

Book a 30-minute working session.

Bring your platform, data, seats and delivery constraints. A pronix.ai strategy or CX engineering lead will walk this document through with your team and adapt it — no slideware, no generic playbook.

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