Optimum Results

Customer Perceptions

A JOINT BUSINESS PUBLICATION

AI in Business

People, capability and customer trust

A practical guide to moving from individual experiments to AI use that your organisation can explain, manage and improve.

01 **The Big Story**
Understand the business context

02 **How Can We Help?**
Connect research with training

03 **Put It Into Practice**
Apply the five questions



PRACTICAL GUIDE / OCTOBER 2026

INTRODUCTION

A practical starting point

AI becomes more useful when organisations connect the technology with the people who use it and the customers who experience it.

This joint publication from Optimum Results and Customer Perceptions explores how businesses can make that connection. It brings together staff capability, responsible working practices and customer evidence, with practical questions you can apply to one process in your own organisation.

The guidance is relevant across sectors and organisation sizes. You might be reviewing AI-assisted administration, preparing a service team for a new workflow or assessing an automated customer interaction. In each case, start with the work you want to improve and the people who may be affected.

THE CENTRAL IDEA

Build capability around the tool. Give the work a clear owner, prepare people to check the results and use evidence to improve the experience.

01 **The Big Story** — AI Has Moved Beyond the Experiment — **3**

02 **How Can We Help?** — From AI Use to Practical Capability — **6**

03 **Put It Into Practice** — Five Questions to Ask Before You Expand AI Use — **10**

Use the checklist on page 12 and the suggested 30-day review on page 13 to turn the guidance into a working conversation. References are on page 14; contact details are on page 15.

The focus is practical business use, especially generative AI and customer-facing workflows. This guide supports planning and discussion; it does not replace a formal assessment or specialist legal and data protection advice.

AI Has Moved Beyond the Experiment

The next step after an individual trial is a repeatable workflow, with clear expectations about information, human judgement and customer experience.

Why the conversation has changed

AI can enter a business through small tasks: drafting a document, summarising a meeting, finding information or generating ideas. An individual may test a tool and decide whether its output is useful. The questions become wider when colleagues rely on it or customers encounter the results.

At that point, the organisation needs to understand what information the tool receives, who checks its work and what happens when it produces an incomplete or inaccurate answer. A successful demonstration is a starting point for learning about the whole process.

Begin by defining the task. A team trying to reduce repetitive administration needs a different workflow from one answering complaints or supporting decisions about employees. The purpose determines the boundaries, the skills required and the level of oversight.

1

People

Skills, judgement and confidence in the task.

2

Process

Approved information, ownership and checks.

3

Customer experience

Clarity, useful answers and a route to a person.

A practical framework for assessing the complete workflow

Measure the complete job

When you assess the benefit, include the time spent checking, correcting and handing over the work. A faster draft can still create extra effort elsewhere. Look at the quality of the final outcome and whether the process is easier for the people delivering and receiving it.

The framework above is a practical model proposed in this publication. NIST's voluntary AI Risk Management Framework offers further guidance on considering trustworthiness throughout AI design, use and evaluation. [5]

What the EU AI Act means in practice

Understand the use case before deciding what oversight, training and specialist support it needs.

The EU AI Act takes a risk-based approach. The rules that apply depend on the system, its intended use and the organisation's role. Uses in areas such as recruitment, employee management and access to essential services can require particular attention. [1]

AI literacy is also part of the framework. The European Commission's guidance connects learning with the AI systems people use, their existing knowledge and the context of the work. A general introduction can help, but staff also need guidance relevant to their actual responsibilities. [3]

A USEFUL FIRST STEP

Create a simple register of the AI tools and features already being used. Include informal use as well as tools introduced through a planned project.

Record	What to capture
Tool and purpose	The tool or feature, the task it supports and the reason for using it.
Information	The inputs, approved sources and any personal or sensitive information involved.
People affected	The staff, customers or other individuals who may experience the outcome.
Owner and checks	The process owner, review steps, handover route and next review date.

Keep data protection in the conversation

Where personal data is involved, GDPR obligations remain relevant. The Data Protection Commission advises organisations to understand how an AI product uses personal data, where it goes, whether the provider retains or reuses it, and how individuals' rights can be supported. [4]

Use the register to identify unanswered questions. Refer those questions to the appropriate internal owner or adviser before the use expands. The register supports visibility and accountability; it does not itself establish legal compliance.

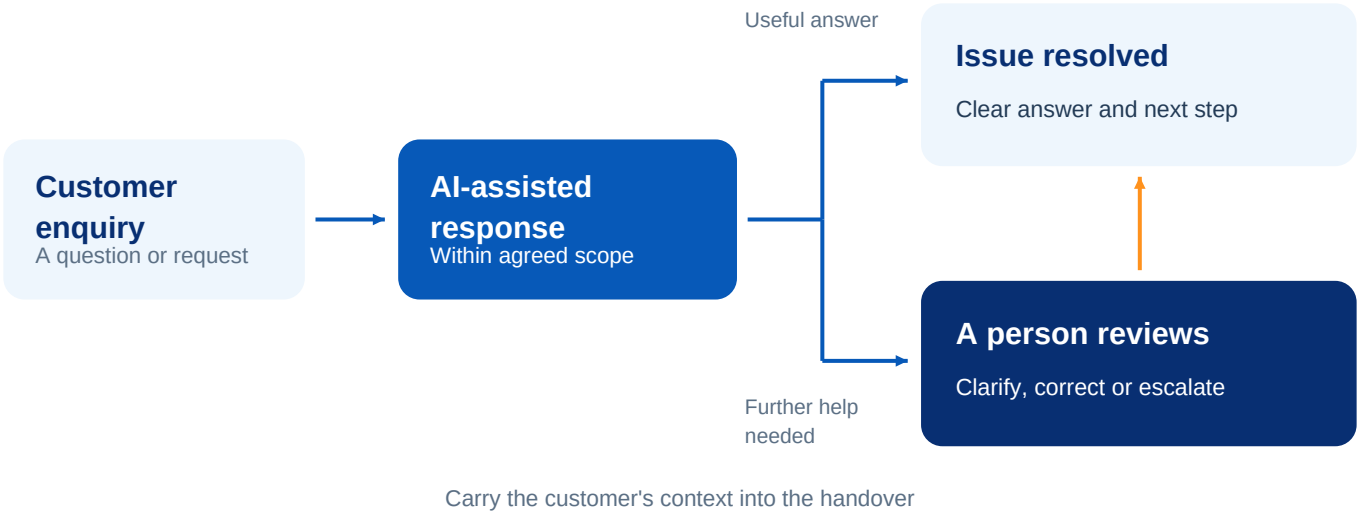
Regulatory note checked 8 October 2026. Implementation is staged and guidance may change. Consult the European Commission and AI Office of Ireland for the current position and requirements for your specific use. [1, 2]

The customer experience question

Customers encounter AI through an answer, a recommendation, a decision or a conversation. Test that experience from their point of view.

An automated interaction may make a service quicker and easier. It can also introduce confusion if the answer is unclear, the language feels impersonal or the customer cannot reach someone who can help. Business intentions need to be tested against what actually happens.

The AI Act includes transparency duties for certain systems and situations, including informing people when they are interacting with AI where required. Build appropriate disclosure into the journey and make the route to human support easy to find. [1, 2]



What organisations should do next

1. **Make the use visible**. List the tools, features and tasks already in use.
2. **Give each use an owner**. Clarify responsibility for information, quality and exceptions.
3. **Train for the real task**. Practise the situations staff face, including uncertain outputs.
4. **Test the customer journey**. Check clarity, accuracy, disclosure and handover.
5. **Review and improve**. Record issues and feedback; update the workflow and training.

Use research to answer specific questions about the experience: what customers understood, where they struggled and whether they could resolve the issue. An efficient interaction should still give them a workable next step.

From AI Use to Practical Capability

Making AI useful and consistent involves the people delivering the work and the customers experiencing the results.

The implementation gap

Access to a tool does not mean a team has an agreed way to use it. One employee may check every answer carefully; another may trust a confident response. Others may avoid the tool because the boundaries are unclear. Managers can struggle to oversee uses they do not know about.

A policy gives direction, but staff need to understand how it applies during a working day. That might mean responding to a complaint, handling a sensitive document or recognising that a suggested answer needs further investigation. Practice helps people make those decisions consistently.

Optimum Results

Prepare the people

Practise the task

Agree checks and boundaries

Develop judgement and handover skills

Customer Perceptions

Understand the experience

Research customer understanding

Test the journey and service steps

Identify friction and improvement needs

A workflow that can be tested and improved

Connect learning with evidence

Optimum Results brings the staff development perspective: how people understand the task, apply judgement and work within agreed boundaries. Customer Perceptions brings the research perspective: how the process performs and how customers understand and experience it.

Together, these perspectives can guide a practical improvement cycle. Identify the problem, prepare the people involved, test the experience and use the findings to decide what should change. The starting point can be one workflow with a clear purpose and owner.

Where Customer Perceptions fits

Research helps you understand what AI adoption feels like from the outside and where the experience needs attention.

Investigate how an interaction works for its audience: what people understand, whether the information is useful and how easily they reach a satisfactory outcome. Choose methods around the decisions you need to make.

Method	Question it can help answer
Customer surveys	Did customers understand the answer and know what to do next? How does that vary across the audience?
Mystery shopping	Does the journey work in practice, including exceptions and access to a person?
Focus groups	Why does the language or interaction feel helpful, confusing or frustrating?
Competitor analysis	How do comparable businesses present automation and support their customers?
Process and service audits	Are the agreed service steps, disclosure and handover standards being followed?

Use the methods together

A survey may highlight a recurring difficulty. A focus group can explore why it occurs. Mystery shopping can then test the route a customer takes when the problem arises. Combining methods gives a fuller picture of the issue and the practical changes that might help.

DEFINE THE QUESTION FIRST

Instead of asking only whether customers like AI, investigate whether they understood the answer, trusted the information and could get further help.

Choose a relevant audience and clear questions, and interpret findings within the limits of the method and sample. Service audits inform improvement; formal legal or technical assurance requires relevant specialist expertise.

Customer satisfaction surveys **Mystery shopping** **Focus groups**

Where Optimum Results fits

Training turns broad intentions into decisions and behaviours people can apply at work.

Optimum Results can help businesses develop the skills around AI-assisted work. The aim is to connect learning with the task, the team's responsibilities and the standards the organisation expects. Relevant learning can draw on management development, customer service, practical AI use and clear working guidance.

Train for the role and the situation

Who	What to practise
People using the tool	Choose suitable tasks, use approved information and recognise uncertainty.
People checking outputs	Verify important facts, assess tone and fairness, and reject unsuitable results.
Managers and process owners	Set boundaries, make time for review and respond to issues raised by staff.
Customer-facing teams	Explain the process, handle concerns and make an effective handover.

Useful practice includes a correct answer, a partly correct answer and a confident answer that is wrong. Staff should also work through situations involving sensitive information, an upset customer or a request outside the approved scope. The discussion should make the stopping and escalation points clear.

FIVE ANSWERS STAFF SHOULD KNOW

What is this for? What information can it use? What should I check? When should I stop? How can a person take over?

Keep the guidance available during the work. Revisit it when the tool, task or policy changes, and use the issues staff encounter to improve future learning. The European Commission's AI literacy guidance supports tailoring learning to people's knowledge, the systems they use and the context. [3]

Explore training programmes **Discuss your team's needs**

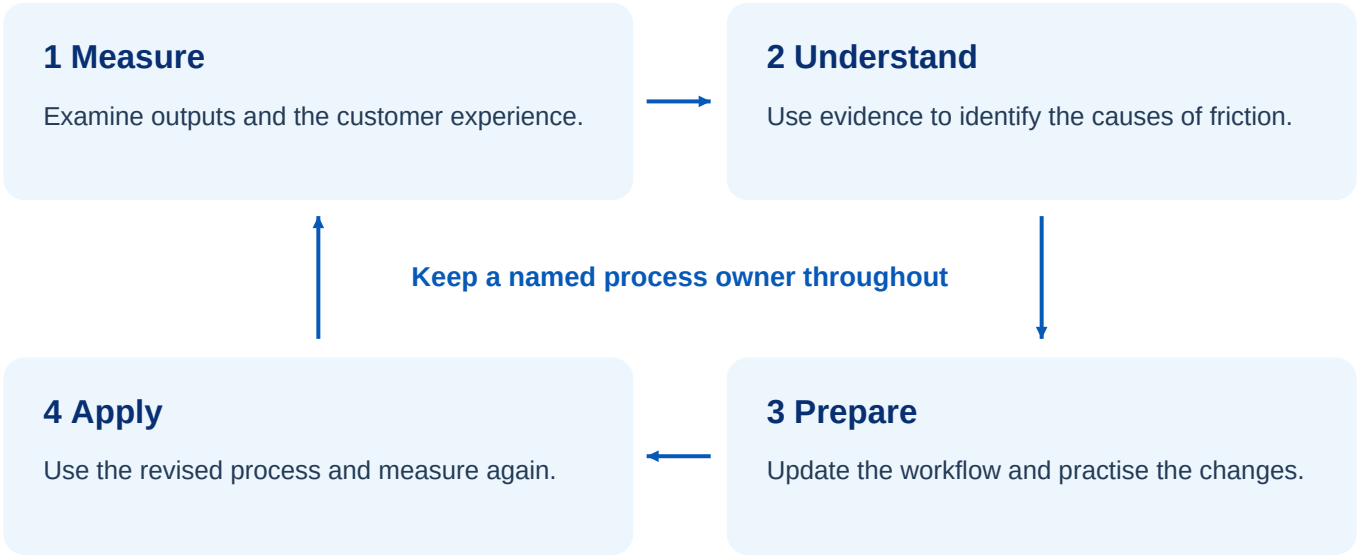
A collaborative example

ILLUSTRATIVE SCENARIO

A service team introduces AI to draft replies to routine customer enquiries using approved information. A member of staff checks each reply before it is sent.

Optimum Results could help the team practise the workflow. Staff would compare accurate and incomplete answers, check facts and tone, and agree when a case needs a different response. The training would cover approved inputs, confidentiality, human review and escalation.

Customer Perceptions could then examine the experience. Mystery shopping might test how easily customers reach a person. A survey could ask whether the response was clear, while a focus group could explore how the language was interpreted. The method would depend on the question and audience.



Suppose the review finds that routine factual replies are clear, but responses to complaints sound cold and the handover is difficult to find. The business could narrow the tool's scope, improve its response guidance and give staff further practice with complaint handling. A further review would check whether the changes improved the experience.

This scenario describes a possible approach, not a named client project or a claim about measured results. The cycle is a practical framework proposed in this publication.

Five Questions to Ask Before You Expand AI Use

Before a trial becomes a standard process, make the purpose, information and checks clear enough for others to understand.

The following questions support a conversation between people using the tool, those responsible for technology and information, and those who understand the customer experience. Apply them to one real workflow and write down the answers.

01 What problem are we solving?

Describe the problem in terms of the work. Is the aim to reduce repetitive administration, improve consistency, help people find information or make a customer interaction easier? Define what a better outcome would look like and how you will assess it.

Record the current process and its difficulty before introducing changes. Choose measures that reflect the whole job, such as checking time, avoidable errors or the quality of a handover. Include the standard of service or oversight you need to maintain.

02 What information is being used?

Identify what the tool will receive, the sources it relies on and who can access the results. Consider customer and employee information, confidential documents and details that could identify someone when combined with other information.

Use only the information needed and approved for the task. Check retention and reuse arrangements with the supplier and involve your data protection owner where appropriate. [4]

WRITE DOWN THE BOUNDARY

For example: the tool can draft a routine reply from approved service information; it cannot decide a complaint outcome or receive information outside the approved input rules.

Keep judgement and accountability visible

03 Who checks the output?

Name the person or role responsible for reviewing the result before it is used. Define the checks: accuracy, calculations, tone, confidentiality, accessibility, fairness and whether the answer addresses the person's need.

Reviewers need the time, knowledge and authority to change or reject the output. Test whether the checking process works at the expected volume. A review that people cannot carry out reliably needs to be redesigned before the workflow expands.

04 What could go wrong?

List the failures that would matter most. An answer could be inaccurate or out of date, use inappropriate language, disclose information or leave a customer without a useful next step. Decide what would help prevent or detect each problem.

Match the control to the failure. Options include an approved source, a second check, a narrower task, a small pilot or a clear escalation rule. Where outputs affect individuals, consider the risks of inaccurate or biased information and inappropriate reliance on automated decisions. [4]

05 How can a person challenge it?

Decide what happens when a customer disagrees, a staff member is uncertain or the system produces a wrong answer. Make the route to a person who can review and correct the outcome visible and workable.

Test the handover from the customer's side. Can they find it, understand the next step and explain the issue without repeating the entire story? Agree who takes responsibility and how the issue feeds back into improvements.

TURN ANSWERS INTO OWNERSHIP

Record the decision, the responsible person and the next review date. Revisit the answers when the task, tool, information or audience changes.

Your AI use review checklist

Use this page with the people who deliver the work. Each answer should point to a decision, a control or evidence you can check.

01 **What problem are we solving?**

Purpose, current process and a measure of success. ☐

02 **What information is being used?**

Approved inputs, sources and supplier arrangements. ☐

03 **Who checks the output?**

A named reviewer with clear checks and authority. ☐

04 **What could go wrong?**

The important failures and a control for each. ☐

05 **How can a person challenge it?**

A visible route to review, correction and human help. ☐

Use case and tool _____

Process owner _____

Measure of success _____

Next action and owner _____

Review date _____

An unresolved answer is a prompt for further work. Agree what needs to change before wider use, then bring the checklist back to the next review. This is a planning aid, not a compliance certification.

Turn the questions into a small review

Gather evidence from one live use case before expanding the workflow.

Review the answers with the people doing the work. Examine sampled outputs and speak with customers or colleagues who experienced the process. Check the review effort, recurring problems and access to effective human help.

A suggested 30-day approach

Days 1-7

Define

Record the use case, owner, boundaries and baseline.

Days 8-14

Test

Run an appropriate small pilot and practise checks.

Days 15-21

Learn

Review outputs, staff feedback and customer evidence.

Days 22-30

Decide

Keep, change, limit or pause the use; assign next actions.

Review area	Evidence to look at
Quality	Accuracy, completeness, clarity and suitability of sampled outputs.
Staff capability	Confidence with the boundaries, checks and escalation points.
Customer journey	Understanding, resolution and access to effective support.
Effort and issues	Total working time, corrections, incidents and near misses.

Decide whether to continue, change, limit or pause the use. Record the reason, assign actions and set the next review date. Adapt the schedule to the use case; some changes need specialist assessment before a pilot.

This is a suggested planning schedule. The appropriate assessment and timescale depend on the use case and its risks.

Sources and further reading

The sources below support the regulatory, data protection and risk management context. The checklists, diagrams and suggested review plan express the practical approach developed for this publication.

[1] European Commission
AI Act overview
Risk-based approach, roles and transparency context.

[2] AI Office of Ireland
Compliance and understanding your obligations
Irish implementation context and links to official support.

[3] European Commission
AI Literacy Questions and Answers
Role, task and context considerations for AI literacy.

[4] Data Protection Commission
AI Large Language Models and Data Protection
Personal data, supplier arrangements and risks in business use.

[5] National Institute of Standards and Technology
AI Risk Management Framework
Voluntary guidance for considering AI trustworthiness and risk.

[6] Optimum Results
Insight Newsletter AI in Business
The source article adapted for this joint publication.

Sources reviewed 8 October 2026. Consult the current versions before making decisions about regulatory obligations. This publication is practical business guidance and does not constitute legal, regulatory or data protection advice.

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WORK WITH US

Connect insight with practical capability

Start with the process you want to improve. We can help you explore the people, learning and customer evidence around it.

Whether you are preparing staff for a new way of working or reviewing the experience your customers receive, the first conversation can focus on your current challenges, the outcomes you want and the questions you need to answer.

Optimum Results

Training, management development and business consultancy to help people apply practical skills and improve performance.

Explore training programmes

Talk to Optimum Results

Customer Perceptions

Market research, customer feedback, mystery shopping and audit programmes to help organisations understand experiences and guide improvements.

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