

SNUG 2026 Roundtable Session Overview

Key Industry Themes

AI Continues to Drive Innovation and Operational Change

AI was one of the most discussed topics throughout nearly every session. Attendees explored how AI can support call center operations through overflow handling, callback management, automation, routing logic, integrations, and reducing repetitive manual tasks.

Discussions highlighted:

- AI-assisted overflow handling and queue management
- AI acting as a supplemental workforce during high-volume periods
- Replicant AI and AI-based routing scenarios
- Automated workflows using APIs and integrations
- Reducing data entry and duplicate work through automation
- Balancing AI usage while maintaining strong human interaction and service quality

There was broad agreement that AI is best positioned as a hybrid support tool rather than a complete replacement for agents.

Security, Compliance, and Risk Management Were Major Priorities

Security roundtables generated significant discussion, particularly around HIPAA compliance, data retention, user access controls, and cybersecurity preparedness.

Common concerns and recommendations included:

- Regular auditing of user permissions and admin rights
- Removing inactive users and enforcing MFA/2FA policies
- Encrypting communications and secure message delivery
- Establishing clear retention policies for data and recordings
- Monitoring SIP trunk security and routing tables
- Maintaining compliance with HIPAA, SOC2, and NIST standards

- Increasing awareness of ransomware and phishing threats
- Creating layered security approaches and crisis recovery plans

Many attendees emphasized that the “biggest threat remains human error,” reinforcing the need for staff training and internal controls.

Disaster Recovery and Business Continuity Planning Remain Critical

There was substantial focus on operational resiliency and preparing for outages or unexpected disruptions.

Common strategies discussed included:

- Multi-provider internet and telephony redundancy
- Cloud-hosted environments with geographic separation
- Cellular backup and SD-WAN solutions
- Backup power and failover routing
- Cybersecurity isolation procedures
- Disaster testing and recovery planning
- Alarm monitoring and real-time notifications

Participants stressed the importance of having documented recovery plans and regularly validating backup procedures.

Routing Logic, SoftSwitch Optimization, and Queue Management

Several sessions centered around optimizing routing behavior and improving operational efficiency through SoftSwitch and queue logic.

Topics included:

- Skill-based routing and weighted priorities
- Dynamic queue handling
- Callback options while in queue
- Overflow routing to AI or alternate queues

- Real-time queue balancing
- Meet Me functionality and auto patching
- Queue time management and announcements
- Managing wait times and reducing abandoned calls

Attendees also discussed how AI may assist with queue overflow and how routing logic can better prioritize high-value or urgent calls.

APIs and Integrations Are Becoming Increasingly Important

The API discussions revealed strong interest in expanding integrations with CRMs, scheduling tools, dispatch software, healthcare platforms, and automation tools like Zapier.

Use cases discussed included:

- Automating data entry and client updates
- CRM synchronization
- Dispatch automation
- Weather-based routing or scripting
- Email parsing and workflow automation
- Integrating with external applications through REST APIs and JSON posts
- Reducing duplicate entry and improving workflow efficiency

There was also interest in additional professional services and implementation guidance to help users expand integration usage.

Reporting, Billing, and Business Intelligence Needs Continue to Evolve

Attendees discussed the growing need for more actionable reporting and better operational visibility.

Conversations included:

- Profitability analysis by client or account

- Comparing AI-handled calls vs live agent calls
- Occupancy and workforce analysis
- Time billing profitability
- Client-facing reporting improvements
- QA reporting and KPI tracking
- Understanding which reports matter most to clients

Several participants expressed interest in more user-friendly dashboards and deeper business intelligence capabilities.

Client Experience and Engagement Features Were Highly Valued

Discussions around IntelliSite and client portals focused heavily on improving customization and usability.

Requested enhancements and best practices included:

- Custom branding and logos
- Shortcut buttons and contact actions
- Client-specific workflows
- Mobile-friendly access and app-like experiences
- Locking down permissions by user role
- Internal usage of portals for staff efficiency
- Client engagement and visibility into activity

Many participants noted the growing importance of providing clients with more modern and self-service oriented experiences.

Dispatching, Presence, and Real-Time Visibility

Several roundtables discussed dispatching workflows and how Presence tools support decision-making.

Topics included:

- Real-time agent visibility
- Presence-based dispatching
- Standardized scripting
- Reducing manual decisions through workflows
- Managing holidays and after-hours protocols
- Improving consistency across teams

There was strong interest in leveraging automation to create more consistent operational execution while still allowing flexibility where needed.

Overall Takeaways

The roundtable sessions reflected an industry actively evolving through:

- AI adoption and automation
- Increased cybersecurity awareness
- Operational resiliency planning
- Workflow optimization
- Improved integrations and data sharing
- Greater focus on client experience and self-service tools

Attendees consistently emphasized practical, real-world applications over theory, with many discussions centered around how to improve efficiency while maintaining high-quality customer interactions and compliance standards.

The collaborative format allowed users to share operational strategies, lessons learned, and enhancement ideas directly with peers and Startel representatives, reinforcing SNUG's focus on education, innovation, collaboration, and member engagement.