

# How to **Streamline and Scale** Customer Support with AI

helpshift

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# Introduction

## How To Get Started

Before we get into the why and how of integrating AI into your support strategy, it's important to note that for it be successful, there is some groundwork that must be established. Overlaying the newest and most innovative technologies onto an already defunct system helps nobody; make sure that you are starting with the following in place:

- 1. An up-to-date knowledge base**
- 2. An effective ticket classification system**
- 3. Chat-based customer support**

If you are launching your first customer support system, keep in mind that while it is possible to start from ground zero with an AI-based support strategy, there are other requirements that must be met first. For instance, you cannot use chatbots or AI effectively with either phone-based or email-based support. And if you do have a messaging-based platform already in place, make sure you have the supporting features that will benefit the most from AI.

Finally, before you dive headfirst into the world of AI in customer support, consider alleviating your agents' fears about automation. While AI will enable you to streamline the customer support process, it is not eliminating human labor. The most effective AI-based customer support strategies actually improve agents' jobs — getting your employees on board with this idea will make the transition that much smoother.

## Why You Need AI ASAP: The Story

The traditional response to scale in the customer service industry has been outsourcing. When companies reach a point at which a few American agents can no longer keep up with the tickets they receive, companies move operations offshore. A decade ago, this was a viable solution: overseas labor was cheap, reasonably effective, and not lacking in supply. Today, however, a combination of two factors have contributed to rendering outsourcing obsolete – it’s too expensive, too slow, and too inefficient – thanks to:

1. Evolving Consumer Expectations
2. Advancements in AI Automation

These two factors are responsible for the outsourcing tipping point – the point where something reaches its critical mass. Customers expect immediate responses, and businesses cannot provide this level of immediacy without shelling out massive costs on additional labor.

According to a recent [Helpshift survey](#), 94 percent of Americans ‘dread’ contacting customer support, and over half of Americans rate U.S. customer service as being below a “B”. Customers are begging for automation – over 55 percent say they would welcome the idea of chatbots being integrated into customer service – and yet many businesses have responded to the need for rapid electronic communication by piling money into inefficient human labor.



**94%** of Americans ‘dread’ contacting customer support



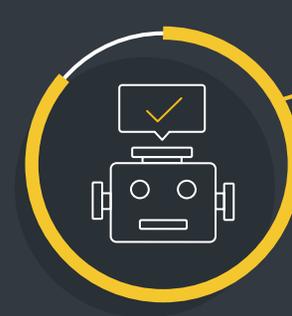
**Over 55%** of customers welcome the idea of chatbot integration

However, recent advances in AI and machine learning have provided a solution to decrease the pressure that has built up on outsourced customer service. In fact, [Gartner predicts](#) that by 2020 customers will spend 85 percent of their relationship with a business without ever interacting with a human. [Forrester](#) similarly predicts that customers will become increasingly likely to churn based on a single negative experience – a daunting prediction – considering that customers who had the best prior support experiences spend 140 percent more compared to those who had the poorest support experiences. Organizations that don't get on board with high levels of automation will find themselves buckling beneath the weight of high costs and dissatisfied customers.

In this ebook we will outline how to successfully leverage AI to automate aspects of the customer service experience through chat – and illustrate the benefits you will see as a result.

AI is still a ways off from being able to independently handle customer issues, and human agents continue to be integral to providing a positive customer experience. However, there are three specific processes in the customer service funnel that are begging to be automated: data collection, issue classification, and self-service.

85%



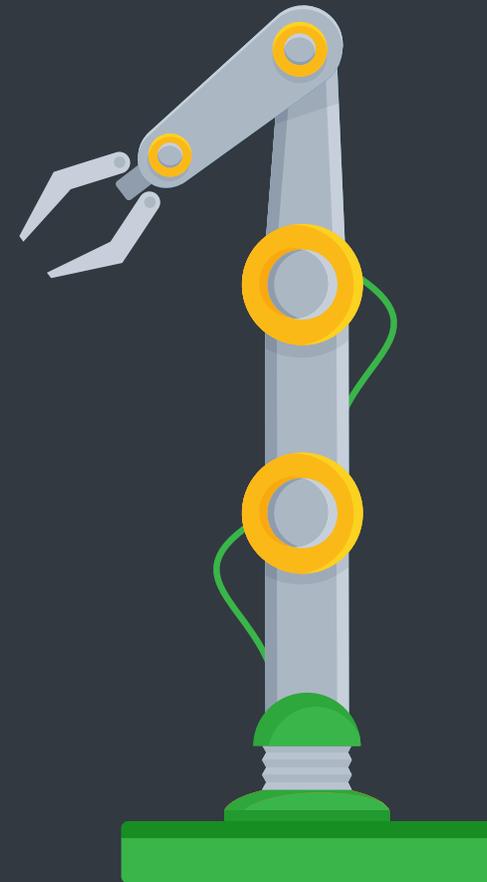
Gartner predicts that customers will spend **85%** of their business relationship without interacting with a human by 2020

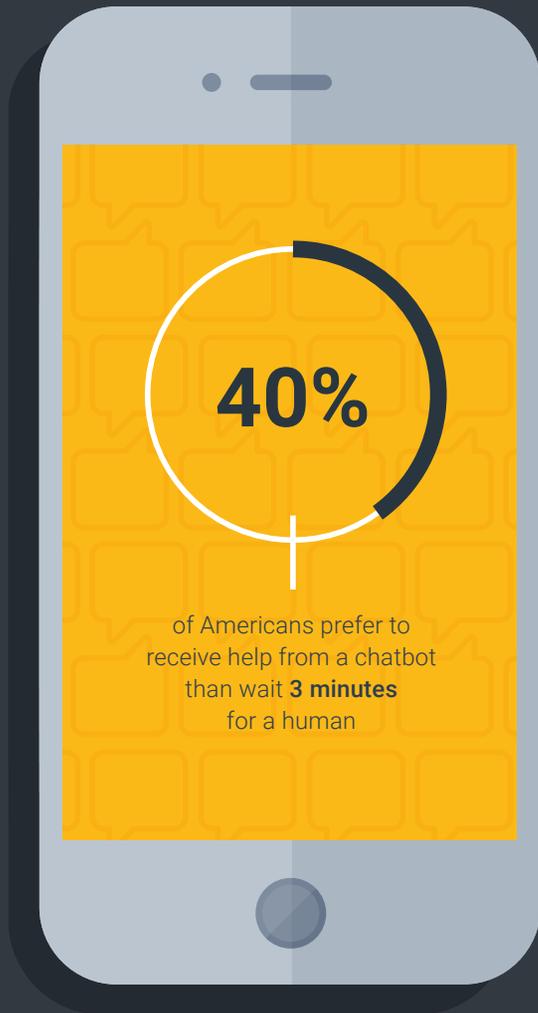
140%



Customers who have had the best prior support experiences spend **140%** more compared to those with poor experiences

**Part 1:**  
**Don't Waste Your  
Agents' Time  
Collecting Routine  
Information**



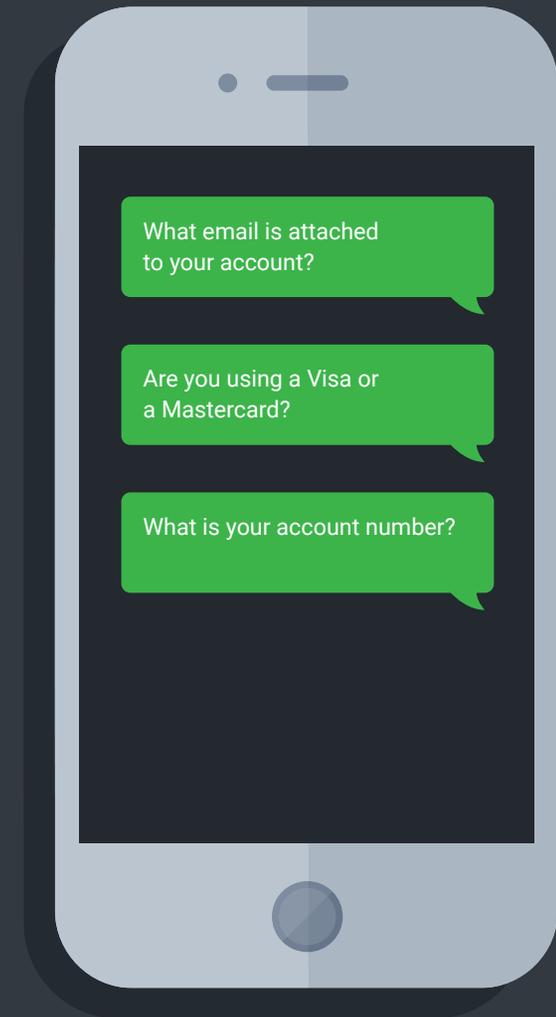


A recent [Helpshift survey](#) confirmed that consumers are using bots for customer service more than in any other field, including productivity tools and purchases. And the reason is simple: many Americans (almost 40 percent) prefer to receive help from a chatbot than to wait over three minutes for a human because chatbots offer a level of immediacy that human agents alone cannot provide – even on live chat.

Much of an agent’s time is wasted on simple data collection. Take the most straightforward initial question that agents often ask: “What can I help you with?” The answer to this question will necessarily include an overarching topic – i.e. Shipping, Payment, Account Information, etc. Once the topic is identified, there are several additional pieces of routine information an agent may need. For instance, if it’s a payment problem the agent may ask “what method of payment are you using?” This information collection process is fairly standardized from customer to customer – even if the ultimate issue may be unique.

## Using Rules-Based Chatbots for Quick Ticket Resolution

Decision-based chatbots perform the data collection process automatically with a high level of accuracy. Acting like a menu, the chatbot offers a list of possible categories for customers to select. Based on the customer's entries, the chatbot asks follow up questions ("what email is attached to your account?", "Are you using a visa or a mastercard?" "What is your account number?"). By the time an agent gets involved — if they even have to! (More on that in Part 3) — there is enough existing information about the ticket for the agent to rapidly resolve the issue. This improves average ticket resolution time and streamlines the user experience. Instead of being shuffled between people, having an issue be misunderstood, or simply having to type out multiple paragraphs on a simple problem, the user just has to click between a few options.



## Easily Improve CSAT Conversion Rates

The decision bot also automates collecting CSAT information at the conclusion of a customer service interaction. Using the same simple menu system, it can ask customers to rate their support experience and collect data on the chat interaction.

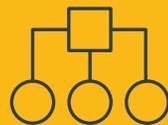
Because the information bot collects end-to-end data, and can collect information across a full network of customers for richer analytics, it can provide holistic and actionable insights into what is and isn't working in the customer support process.

### The Results



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Faster time to first response



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Instant and accurate agent routing



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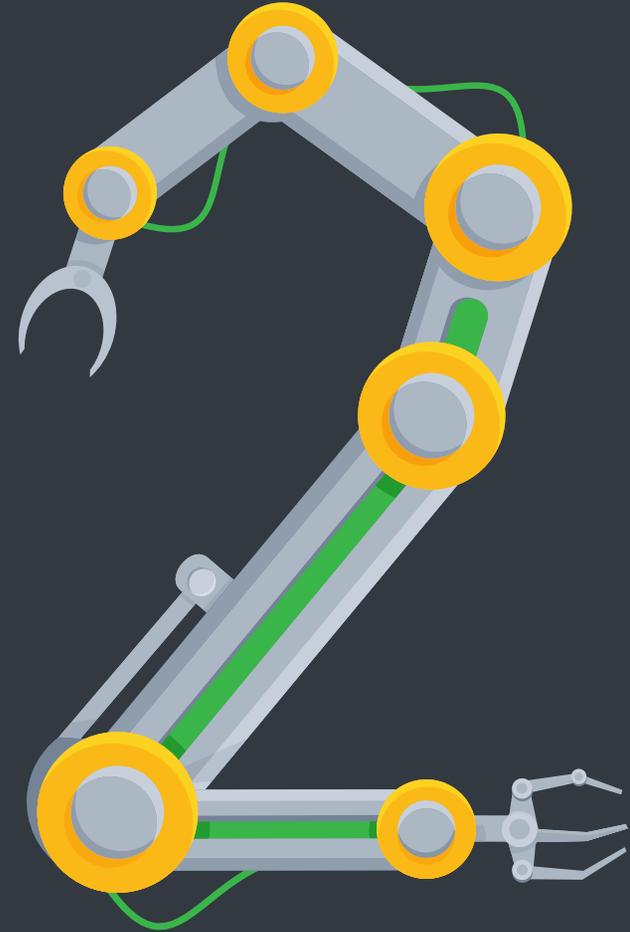
Shorter ticket resolution time



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Improved agent experience

**Part 2:**  
**Triaging Tickets  
Should Not Require  
a Supervisor**



## Use AI For Issue Classification

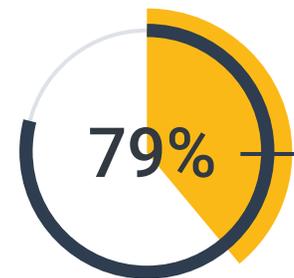
While the information bot can effectively collect data, it cannot pick out intent or classify issues beyond the processing of a user-selected, pre-programmed menu option. AI, on the other hand, can instantly conduct the triaging aspect of customer service: a process that is currently done manually, and takes massive amounts of time and effort for a relatively simple task.

The manual process today follows this process: supervisors need to initially read and label every chat, then the conversation gets routed to the appropriate team based on categories like language and category, and finally an agent is assigned the ticket and can initiate the conversation. This process is not only cumbersome, but is also slow, and detracts from the user experience.

Today seventy-nine percent [of customers](#) say that they prefer live chat because of the immediacy it provides. Even as early as 2013, chat had already edged out phone and email support due to the high CSAT ratings it yields, for one simple reason: 42 percent of customers said that not having to wait on hold was the determining factor. Manual issue classification is the equivalent of putting a customer on hold, and the only way to eliminate this time lapse is through automation.

Through machine learning, bots can be trained to pick out keywords and phrases from a large set of data and classify a ticket based on these words. To test the accuracy of the machine, AI engineers can use a sample set of data that has already been classified by humans, and compare it against the machine's classification abilities. In each iteration of this process, the machine will become better and better at classifying, until it reaches acceptable accuracy levels for ticket classification.

Leveraging AI to own this process is crucial: it means that instead of having a human classify an issue and then route it accordingly, a machine can funnel tickets into the correct slots with no human intervention. This speeds up the entire process immensely and decreases the need for routine human labor.



**79%** say they prefer live chat to phone or email support because of the immediacy it provides

**42%** said not having to wait on hold was the determining factor

## This Helps the CX Side too!

Intelligent triage can dramatically improve the customer experience. Too often, customers are put on long holds only to be transferred from agent to agent so that by the time customers reach a person who can actually help, they are irritated and feel disrespected. To make matters worse, customers often have to repeat their issue to multiple people, which is time consuming and frustrating. It's no wonder that [Forrester reports](#) that fewer and fewer people are turning to the phone for customer service when any other option is available.

Unlike annoying and limiting IVR (Interactive Voice Response) phone menus, AI can understand key intent via typed language, and can route issues more rapidly than a human. This decreases wait time, which is a massive value point for the customer. By the time the customer speaks to an agent, the agent will already have information on them, will be appropriately trained to address the question, and the customer will only have to have one single and seamless agent interaction. It's no wonder that over 72 percent of customers say that chatbots and AI significantly reduced the amount of time it spent to explain an issue to an agent!

## The Results



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Free up supervisors from having to manually classify issues



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Quicker time to first response



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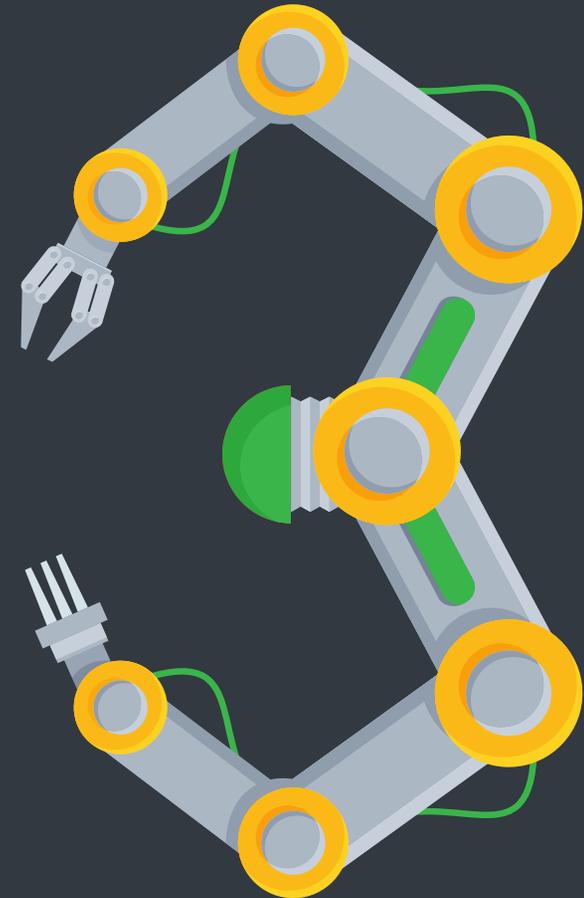
Higher levels of issue classification accuracy



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Happier customers

# Part 3: Self-Service is Even Better with AI



## Intercept Communication with Suggested Knowledge Articles

Ticket deflection is one of the most salient ways to decrease agent overload. Allowing customers to solve their own problems without an agent saves your organization time and money. Considering that [one third](#) of consumers would rather clean a toilet than talk to customer service, ticket deflection can have a major impact on CSAT ratings too.

More than [90 percent](#) of all consumers expect a brand to offer self-service. Despite this preference, though, many customers will default to chat support before they go searching for a self-help portal. Because so many brands lack searchable, relevant articles, consumers expect that chat will offer a faster, more straightforward resolution.

Brands need to meet this expectation without maxing out agent resources — which is where AI comes in. AI can intelligently suggest an article that may help customers resolve the issue on their own. For instance, if a customer types a query about a payment issue, the self-service bot can suggest a knowledge base article on which types of payment are acceptable. The bot will then ask if this suggestion was helpful or not, and if it was, the ticket is resolved. If it wasn't, the get info bot kicks in and the ticket is routed to an agent accordingly.

**This information not only ensures that the customer will get their issue resolved, but it also provides valuable information on the efficacy of individual articles — information that can be used to improve their accuracy.**

Offering self-service through a messaging experience rather than traditional self-service adds immense value for the customer — in part because the user does not have to search at all, and in part because consumers love messaging. There are [nearly 4 billion global active users](#) of messaging apps, and the popularity of messaging only continues to grow. When users are able to navigate self-service options through messaging, they not only get intelligently routed to the most appropriate article, but they also receive this intelligent routing via a medium they are comfortable with.



More than **90%** of consumers expect a brand to offer self-service

**1/3** of consumers would rather clean a toilet than talk to customer service

## This Usage Benefits Agents, Arguably Even More than Customers

When a customer is routed to an agent, this same suggestive machine can prompt agent responses with published or unpublished articles. Say, for instance, that there is a known issue with your organization's app on iPads. Because the bug is being addressed by the engineering team, you don't

want to publish an article about it. However, you can write an article for agents only that will be prompted as a response based on information that is initially collected. This improves agent efficiency and helps give customers quick and accurate answers.

### The Results



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Higher Ticket  
Deflection Rates



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Improved  
Average CSAT  
ratings

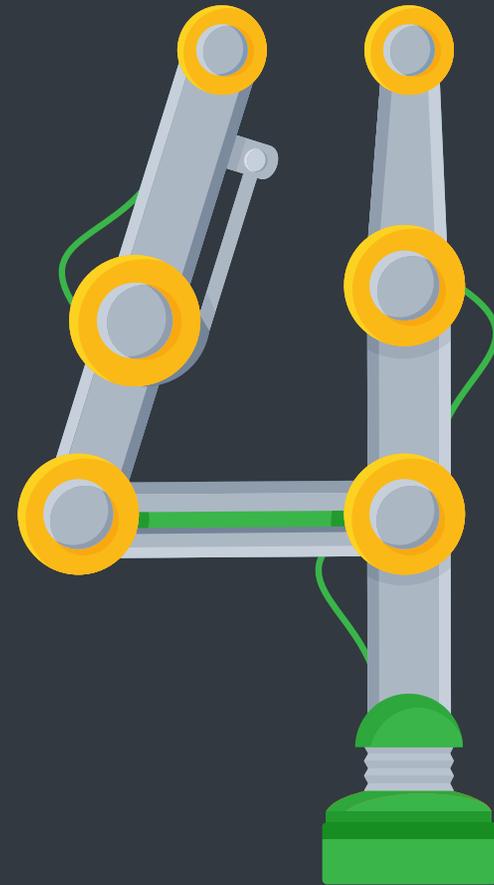


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Quicker  
resolve times

## Part 4:

# AI + Agent Collaboration: How Automation Improves The Agent Experience



**Chatbots and AI enrich the agent experience immensely. By performing the more mundane and routine (yet labor intensive) tasks, robotic automation ensures that agents:**

- 1. Only see tickets that relate to their area of expertise**
- 2. Have all the necessary data to rapidly resolve the customer's query**
- 3. Primarily address tickets that cannot be addressed through published self-service routes**
- 4. Receive intelligent suggestions to rapidly respond with pre-populated or easily customizable responses**

In other words, automation enables agents to do what they do best: resolve customer complaints and questions. It also dramatically improves the agent experience: nobody enjoys interacting with a frustrated customer — but currently, by the time an agent actually interacts with a customer, regardless of what the agent says or does, the customer is already frustrated by long wait times and lack of self-service, and may be unpleasant to deal with.

This has historically made recruiting talent in the U.S. difficult: unless a job pays extremely well, most people would prefer to work in a position in which they are not faced with angry people throughout the day. AI-powered automation, by improving the overall agent experience, makes the industry as a whole more appealing to qualified candidates.

## Conclusion: Building Out The Technology Infrastructure For Continued Success

Automating certain aspects of customer service interactions dramatically reduces interaction time for both agents and customers. Not only is this cost-effective, but the streamlined customer experience also serves as a competitive advantage. Think of Amazon's two-day shipping: by setting a new industry standard for speed and fulfillment, Amazon has gained a massive market share. Customer service is at a point where companies that streamline the customer service interaction and promote self-service will gain a similar advantage over competitors.

### With the resources provided in this ebook you should now be ready to:

- Leverage chatbots to collect initial user data
- Implement AI for rapid, intelligent ticket routing
- Decrease ticket load through self-service bots
- Utilize CSAT chatbots for improved CSAT conversion rates
- Improve your agents' experiences with all of the above

Forrester's 2017 predictions noted that "today's customers reward or punish companies based on a single experience — a single moment in time. This behavior was once a Millennial trademark, but it's now in play for older generations.

It has become normal." The stakes for customer service are higher than ever, and businesses cannot afford to have long wait times, inefficient issue resolution, or low CSAT scores.

As natural language processing improves and chatbots evolve through deep learning, machines will become increasingly adroit at understanding user intent — to the point where end-to-end customer service interactions will be machine-owned. [Gartner predicts](#) that by 2019, artificial intelligence platform services will cannibalize revenues for 30 percent of market-leading companies and that by 2020 companies using AI will achieve long-term success four times more often than their counterparts. Looking forward, companies must implement the infrastructure for AI and robotic automation today before these processes become ubiquitous and no longer provide a competitive advantage.



Gartner predicts that artificial intelligence services will cannibalize revenues for **30%** of market leading companies



## The Helpshift AI Solution

Helpshift offers next generation customer support powered by human-centric AI. Through robust bot and AI-powered services, Helpshift's intelligent AI platform automates and streamlines the customer service funnel.

With an intuitive user interface, Helpshift makes it easy for businesses large and small to proactively support and engage their customers both in-app and on the web — making it easy for companies to provide a best-in-class customer support experience on any device.

Companies such as Zynga, Virgin Media, Microsoft, Flipboard, Supercell, WordPress, and thousands of other industry-leading brands, startups, and developers use the Helpshift platform to provide in-app support. Helpshift is installed on two billion devices worldwide, and serves 300+ million mobile customers monthly.

**To learn more about how you can use Helpshift to integrate AI and Chatbots into your customer service strategy, [schedule a demo today](#).**