



helpshift

The Ultimate Guide to Digital-First Customer Service

Why You Need to Start Now
and How to Do It

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What You Can Expect From This Guide

It's quite likely that the majority of your customers contact your customer service (CS) organization through digital channels. Since they're looking for support via digital, you need to be available and responsive in these channels.

But do you know which digital channels to prioritize?

While many customer service organizations have adopted an omnichannel approach, this strategy falls short in two key ways: it creates siloed, disconnected experiences for the consumer, and the channels that are used most frequently cause long wait times and operational inefficiencies.

If your contact center is not yet offering support via messaging and bots, it's time to rethink your strategy. These customer service channels — and the tools that support them — enable brands like yours to satisfy consumer expectations for convenient support and speedy issue resolution while boosting agent productivity and reducing costs.

The focus on messaging and bots is a new way of thinking about customer service to create a fluid, connected experience for the consumer — and that is precisely the driver behind the creation of this guide. This guide will help you understand the unstoppable evolution toward digital-first customer service, and how you can equip your company and agents to deliver the customer experience (CX) that sets today's winning brands apart. We're going to guide you through it step by step and make it a tangible strategy you can activate within your own customer service organization.

Inside this guide, you will find all the context, worksheets, infographics and data-driven analysis that you need to get started with effective digital-first customer service.

Since you may want to focus on specific topic areas, we wrote this guide using a modular approach. We cover the topic in-depth and from multiple angles so you will walk away with a thorough understanding of digital-first customer service and how to chart your own course. If your organization already recognizes the need to adopt a digital-first CS strategy, you can skip the early sections that focus on justifying such a strategy and jump right into learning how to get there — just begin your reading on page 14 at the start of the section entitled “Messaging: One Channel to Bridge them All.”

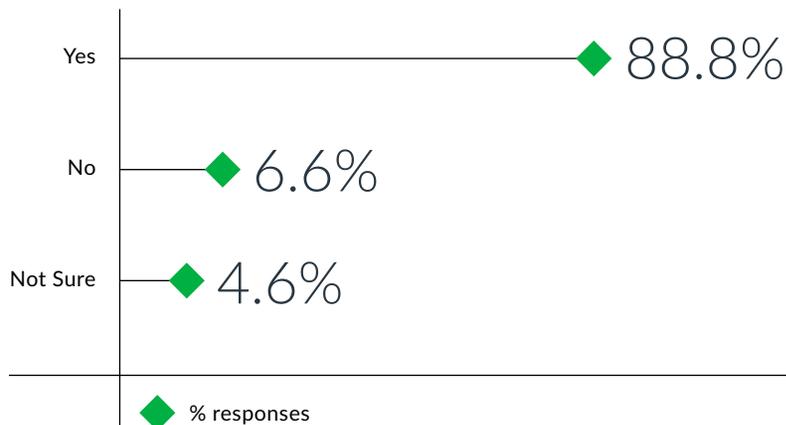
Digital Transformation Reaches the Customer Service Organization

Brands know they can't compete with the likes of Amazon and Uber when it comes to pricing, product assortment, or supply chain excellence. But leading brands recognize the opportunity to differentiate by delivering the best customer experience possible. And they're realizing that vision by digitally transforming their customer service organization.

Nearly 90 percent of company leaders view customer experience (CX) as a competitive differentiator, according to the 2019 Global Customer Experience Benchmarking Report.

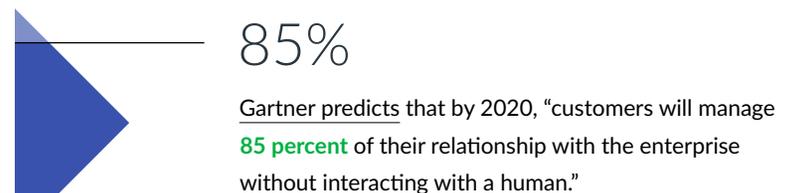
Do you view customer experience as a competitive differentiator

Customer Services – B2C



No wonder two-thirds of the CEOs of Global 2,000 companies are planning to adopt modern digital strategies to improve the customer experience before the end of 2019. And the impact will be widely felt. Gartner estimates that 85 percent of all customer interactions will be managed without a human by 2020.

This revolution in customer service is being driven by three key factors—new technologies like Artificial Intelligence (AI), the ubiquity of digital channels, and consumer demand for faster, more convenient and consistent customer service. You can take advantage of this revolution to set your organization apart.

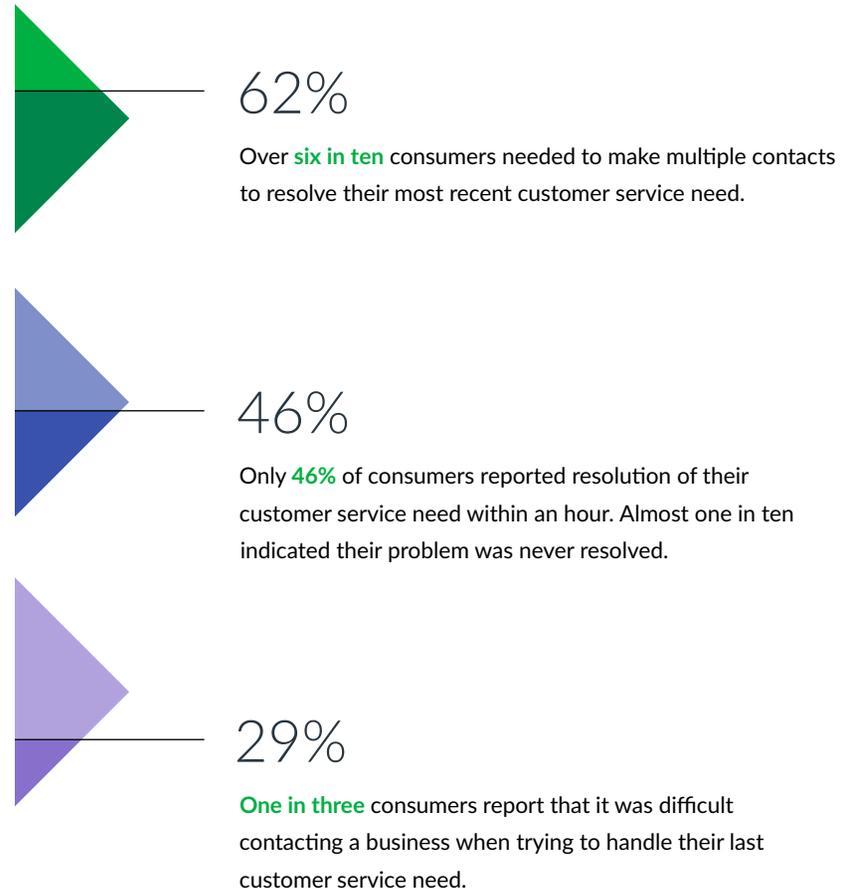


The Growing Preference for Digital-First Interactions

There's no question that customers are empowered by technology, and are using that empowerment to get what they want, when and how they want it. More than half of all consumers now expect a customer service response within one hour – not only during business hours, but around the clock, including nights and weekends.

This paradigm shift to real-time, any-time gratification is compelling customer service organizations to make themselves accessible and on-demand on a 24x7 basis. Fail to do so and they risk making a large portion of their customer base feel undervalued. That's reflected in the 66 percent of online adults in the U.S. who say that the most important thing a company can do for them is to value their time by providing a good online customer experience.

Unfortunately, too many companies fall short when it comes to the customer service experience. Nearly 1 in 3 customers report difficulty reaching customer service, 6 in 10 need to contact customer service multiple times to resolve their issues, and only 46 percent say their issue was resolved within an hour.



Source: <https://www.northridgegroup.com/insight/state-of-customer-experience-2018-report/>

New Channels Emerge to Meet Consumer Demands

Let's first review the most common customer service channels, along with their pros and cons:

◆ Phone

Thanks in large part to legacy systems and the acceptance of phone support by the Boomer and Silent generations, phone still makes up the majority of customer service interactions. The pros of the phone include supporting customers who need urgent assistance. But the phone has major disadvantages. Long wait times can easily irritate customers, and the need for agents to work on one issue at a time makes the process inefficient. Plus, keep in mind that live phone conversations for customer service interactions are rapidly falling.

◆ Email

Most companies start out using email for customer service, but quickly come up against scalability issues. Agents end up dealing with a clunky UI and ticket backlog, while customer satisfaction drops because of a lack of live responses and slow turnaround times.

◆ Social Media

Many companies establish dedicated customer service social pages (usually on Twitter) in an effort to minimize negative exposure and help resolve customer issues. But social media is not reliable and predictable enough to serve as the foundation for a customer service strategy. Messaging apps via social media such as Facebook Messenger can be more reliable.

◆ Live Chat

Many messaging-based strategies include some level of live chat for VIP/loyalty customers, urgent issues, or tickets that are escalated from a bot. However, it's hard to scale live chat when serving a large number of customers, and they can end up waiting in a queue for an agent.

In reality, many companies thought that an omnichannel approach would be the ideal way to service the modern customer but now recognize that they do not even use all these channels. To fulfill brands' desire to modernize, a smarter approach leverages the selective application of digital-first technologies and AI to provide a fully-connected customer service journey across channels.

The False Promise of Omnichannel as Your Digital-First Anchor

The omnichannel mantra dictates that you be in every channel where your customers exist. But just being in every channel is not a strategy. It's a tactic that often proves unnecessary and expensive. Instead, you should think through your approach to each channel before deciding on which to support.

Look at it this way: Customers don't express a desire to meet with brands via phone, email, chat, etc. Instead, first and foremost, they want a conversational and convenient experience with minimum barriers to resolution. But that's precisely where omnichannel often stumbles.

With omnichannel support, companies find it difficult to connect the different modes of communication. When disconnects occur, customers are forced to start over and repeat themselves with each new chat, email, or call. They grow frustrated and feel their time has been wasted, while company resources get drained quickly. It's a lose-lose proposition. It's in your best interest to avoid such isolated and broken experiences at all costs, which is why leading with omnichannel as an overarching strategy is both expensive and superfluous.

The important thing is to choose the channels that enable the optimal blend of customer experience, agent experience, overall customer service excellence, and operational efficiency.

Siloed Experiences Lead to a Disconnected Customer Journey

Customer service happens on all the platforms that consumers use to communicate with one another – traditional phone calls, email, chat, social media. But – no matter why they are contacting customer support – consumers experience much more frustration communicating with customer service across these channels.

Siloed experiences lead to a disconnected customer journey. With omnichannel, the idea was to start adding channels, keeping self-service separate. Support teams started layering on email, live chat, social, phone – with all of these channels being agent-powered. When customer service teams wanted to incorporate bots, they added them to help with self-service – but did not embed this functionality across channels or carry over context. This has still resulted in a disconnected customer experience because all the elements are siloed.

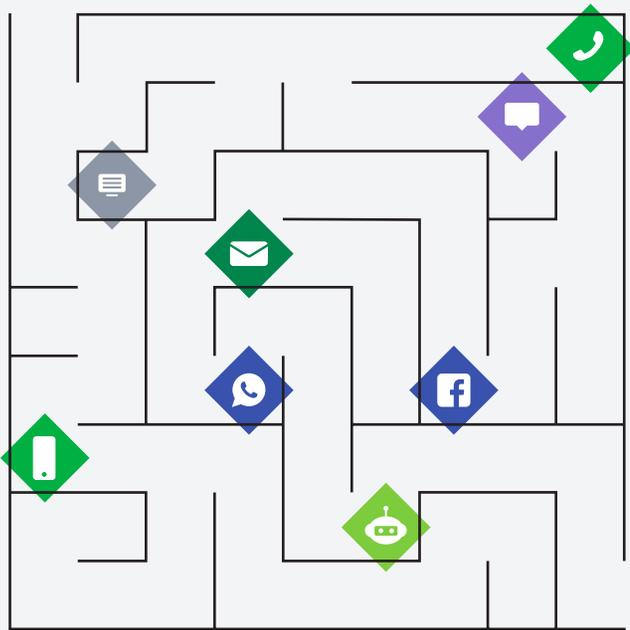
Think about the experience from your customers' perspective – it's very disconnected. The consumer can't continue a conversation from channel to channel or from self-service to a channel. Plus, the agent doesn't have a full view into the customer journey to date.

When they call their best friend, consumers are not put on hold or transferred from person to person. When your customers message a friend they haven't connected with in a while, the conversation doesn't disappear if the friend takes hours to respond. Consumers have developed expectations of these communication channels based on their personal experiences – and they expect customer service organizations to satisfy them too.



The Promise of Omni-Channel

Difficult to Navigate
for the Consumer



Unified
for the Agent



Experience is Built for the Brand, Not For the Consumer

The omnichannel promise unified the experience for the agent. But that's not good enough. In the image on the previous page, you see how the experience is broken for the customer.

Over the past decade, customer service has progressed from a nearly sole reliance on call centers to incorporating a variety of technologies such as email, live chat, and social media messaging. With these new digital channels, customer service enjoys greater scalability while delivering an increasingly user-friendly experience for both consumers and agents.

The introduction of email and live chat meant customers no longer had to waste precious time on hold or being bounced from agent to agent to solve their problems. Using these technologies, organizations can enable their agents to handle multiple inquiries simultaneously rather than be restricted to 1-1 phone communications.

However, both email and live chat presented new problems.

It's challenging to staff for live chat because it requires significant manpower to scale. On the plus side, agents can handle roughly two simultaneous conversations with live chat on average. However, these agents are tethered to those two conversations and can't escape the wasteful downtime while awaiting customer responses.

From a customer experience perspective, live chat's lack of persistence presents a significant problem. If a customer inadvertently closes out of a chat window or tab, or leaves for more than five minutes, the conversation history is lost. The customer is forced to restart the conversation — a frustrating experience — and will most likely sit around until the issue is resolved to avoid another frustration.

Email introduces the opposite problem. It can be cost-effective to staff for email, but the time lag in responses can frustrate customers and agents alike. Time to resolution can take days — and that's simply unacceptable in an on-demand world. For digital-native brands, this can result in churn — from both customers and agents.

The Missing Piece in Transforming to Digital-First: Connected Consumer Conversations

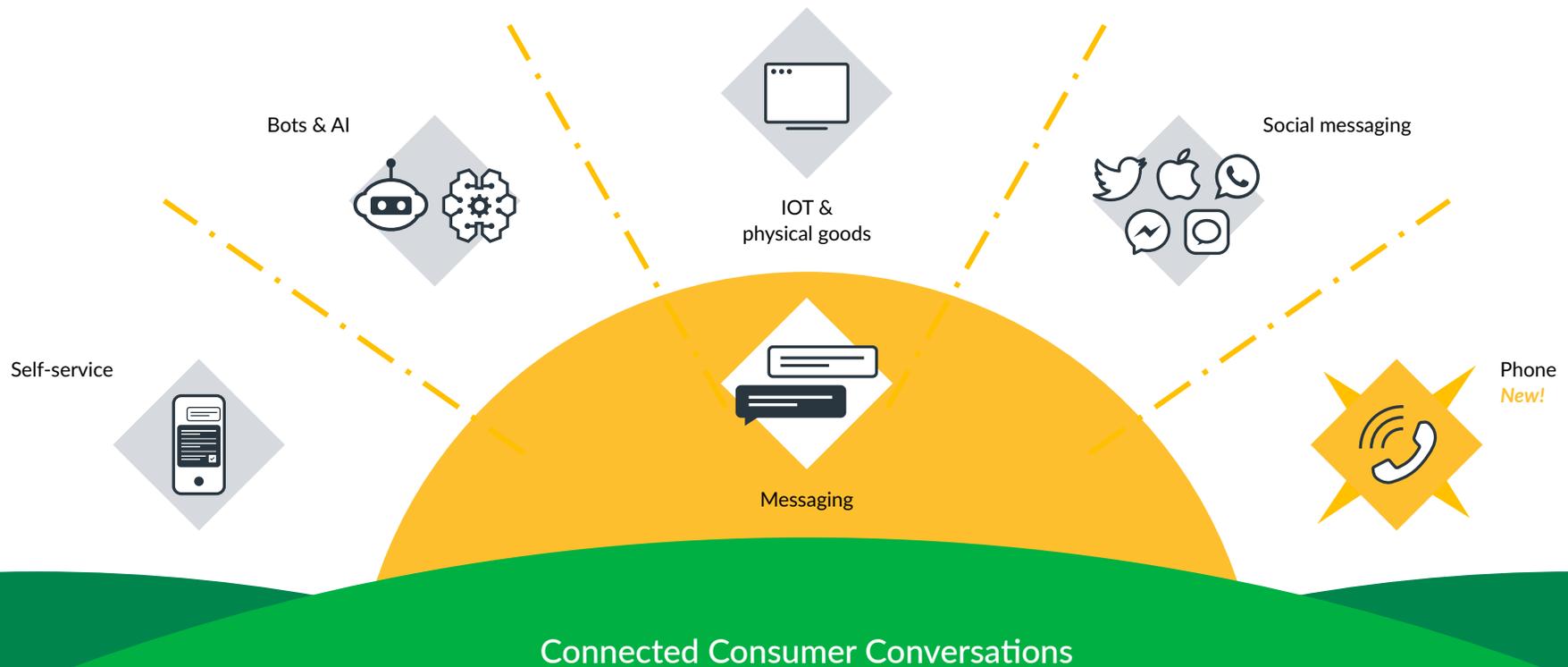
Omnichannel is a platform for your team, with all agent functionality and all channels accessible from the agent dashboard. It's connected for your agents. But what we haven't seen is a connected channel experience for your customers.

Creating a Connected CX Strategy

What it takes is a unifying experience that connects all communication channels, as well as self-service and bots for the full journey, for your customers. With a connected channel experience, your customers can see their conversation history, pick up the conversation where they left off and not have to repeat themselves across different channels.

Once again, brands look to modern communication.

Brands needed a way to enable ongoing conversations – whether their agents were available to respond instantly or not. They needed the conversational interface of live chat and the persistent nature of email. They also needed a way to deliver an experience that would not force customers to wait on hold or repeat themselves. Of course, it also had to be cost-effective to staff.



The Secret Ingredient: An Asynchronous Approach

Enter asynchronous messaging – the communication format that consumers already use and love on their smartphones with today’s messaging apps (WeChat, iMessage, WhatsApp, etc.). These apps are all async-enabled, which is the best way to communicate and capture the benefits of email and chat – without all the associated costs.

Just consider the growing popularity of these messaging platforms for consumer to consumer interactions:

- There are nearly 4 billion global active users of messaging apps
- U.S. smartphone users are sending and receiving five times as many texts than phone calls each day
- The top 7 apps in the world in terms of frequency of use are all messaging apps

Asynchronous-enabled communication (aka async-enabled) solves the disconnect problem that occurs when your customer service organization tries to connect different channels of communication. To understand how it does that, first we need to explain what async-enabled communication is and how it’s different from synchronous communication.

At the most basic level, asynchronous communication is time-lapsed while synchronous communication happens in real time. We often flow between the two in our daily lives, for example, sometimes chatting in real time, and other times responding at our convenience much later.

Asynchronous communication represents the way consumers interact with one another on messaging platforms. They can engage in a fluid, ongoing conversation that does not rely on immediate responses. We tend to rely heavily on this type of communication every day. Think about sending an email in the morning and not receiving a reply until the afternoon or the next day. We might wait until after work to respond to a group text, and answer Slack messages after finishing an important project.

Asynchronous messaging is completely disrupting communication. We have definitively entered the era of messaging with the skyrocketing popularity of platforms such as iMessage, Whatsapp, Slack, and WeChat. What makes these channels so popular? It’s the convenience of having an ongoing conversation without both parties necessarily being available in the moment.

Unlike live chat, which is dependent on conversations happening in real time (synchronous), most consumer communication is now async-enabled.

Through async-enabled communication, consumers can access full chat histories and seamlessly transition between live and lapsed communication.

This is why communications have overwhelmingly evolved to become asynchronous.

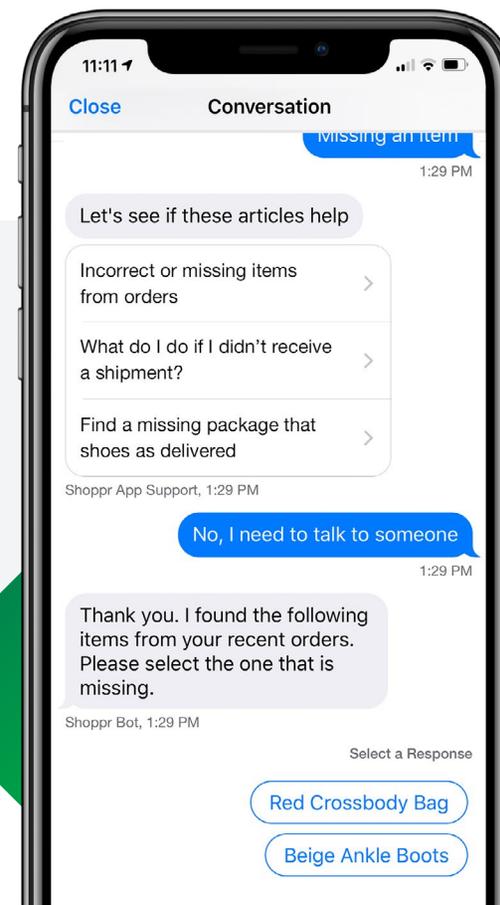
Messaging is ideal because it's perfectly suited to the ebb and flow of combined live and lapsed communication that consumers are used to. It helps that consumers can access messaging platforms on every device type, from mobile phones to computers and tablets.

By enabling messaging for these devices from a UX perspective as well as including notes and conversation histories on the agent side, brands create a messaging experience that is async-enabled from both the consumer and the agent perspective.

The messaging channel is particularly attractive for brands because consumers have been proactively seeking them out via these apps for years. Since 2016, users around the world were logging in to messaging apps to not only chat with friends but to connect with brands. And they are expressing this desire across generations. Messaging apps surpassed social media networks in popularity several years ago and continue their meteoric rise as consumers make their preference for messaging clear.

While live chat sets expectations for instantaneous responses and resolution, messaging allows for more fluid dialogue exchanges. By enabling a fluid transition between live messaging and asynchronous messaging, a messaging interface offers the best of email, phone, and live chat combined. Messaging affords the convenience of time-lapsed exchanges while providing real-time escalation to live conversations for urgent/VIP use cases. This optimizes the experience – both on the agent side and the customer side.

The conversational nature of messaging allows brands to deliver personalized, convenient, and efficient customer service just when a customer needs support. In fact, even though messaging does not promote an expectation of immediate responses, customer service organizations are able to resolve customer inquiries much faster via this channel. No wonder brands score higher CSATs with asynchronous messaging than with email. Plus, consumer familiarity with messaging means brands using this channel are in tune with their customers, and can optimize user experiences at scale.



Integrating AI and Automation for Greater Efficiency

The delivery of fast and efficient asynchronous messaging requires two technological pillars: AI and automation. When we refer to the use of AI, we're not talking about the general application of AI which, frankly, has failed many customer service teams. Instead we are referring to the new paradigm in which the messaging platform serves as a container that uses AI and bots to make asynchronous messaging faster and more effective. For example, the Helpshift platform incorporates AI into asynchronous messaging solely for the purposes of classifying issues and offering knowledge articles. By selectively incorporating AI and automation into the asynchronous messaging process, organizations can automate over 50 percent of customer service interactions.

3. Significant boost to agent productivity with the introduction of bots

Bots significantly reduce the number of average agent-sent messages per interaction within live chat and asynchronous messaging on the web and mobile. This frees up each agent to work on more issues within a given period of time. (*More on bots in a bit.*)

After launching asynchronous messaging across web and mobile in 2018, brands are now seeing stunning levels of automation without compromising customer satisfaction. [Read all the ways](#) they're making this happen.

Asynchronous messaging delivers three big benefits for brands:

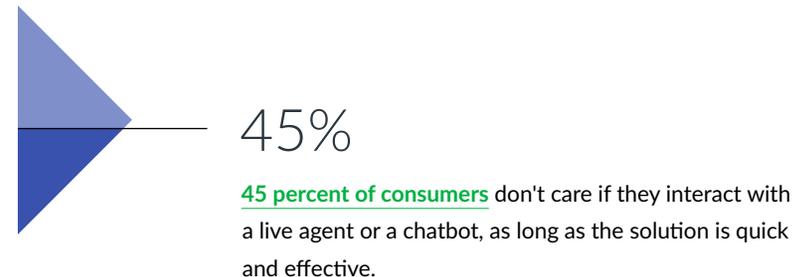
1. Much higher CSAT ratings for messaging-based conversations

- Messaging with **4.1**
- Live chat with **3.6**
- Email with **3.3**
- Web forms with **3.0**

**CSAT scores, by channel, on a scale of 1 to 5*

2. Ability to automate more than 50 percent of customer service interactions

In addition to automating without affecting CSAT, brands that use self-service tools like FAQs in tandem with automated workflows achieve the strongest KPIs.

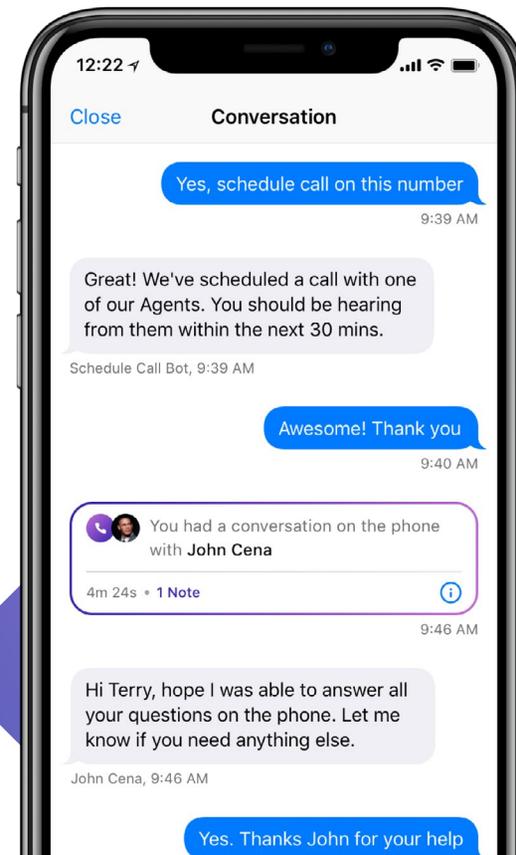


Messaging: One Channel to Bridge them All

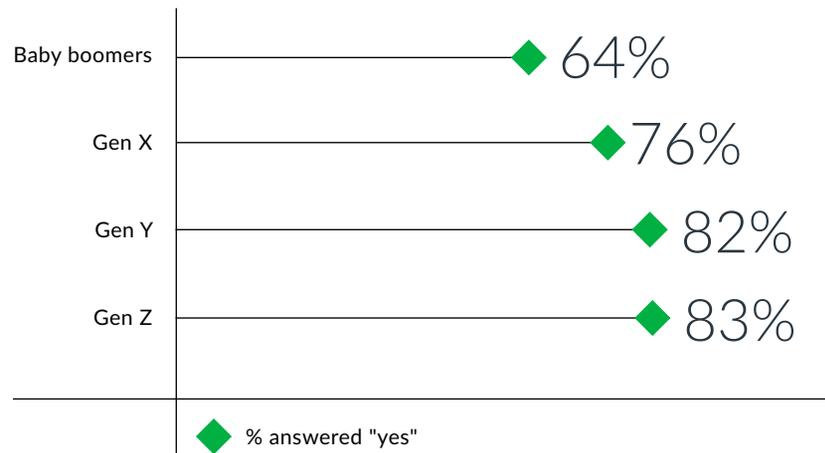
Twenty years ago, brands provided customer service either in-person or over the phone. It's hard to believe but just a few years ago, brands were trying to support consumers with thousands of underpaid, poorly informed agents offering hit-or-miss resolution to customer issues.

Today, many of these same contact centers are using advanced technologies — specifically AI and bots — to collect routine information. In turn, they are employing fewer — but better equipped — agents who can adeptly handle more complex issues. While these companies benefit from far more efficient staffing models, their customers benefit from a stellar customer service experience.

The reason is clear — on agent-assisted digital channels like messaging, customer service can respond much more quickly to customer inquiries. Note the dramatic improvement in response times when using messaging versus email or social media: **18.5 minutes** compared to **69.6 minutes** via social media and **411.4 minutes** on email.



Do you wish more businesses would use texting to communicate with you?



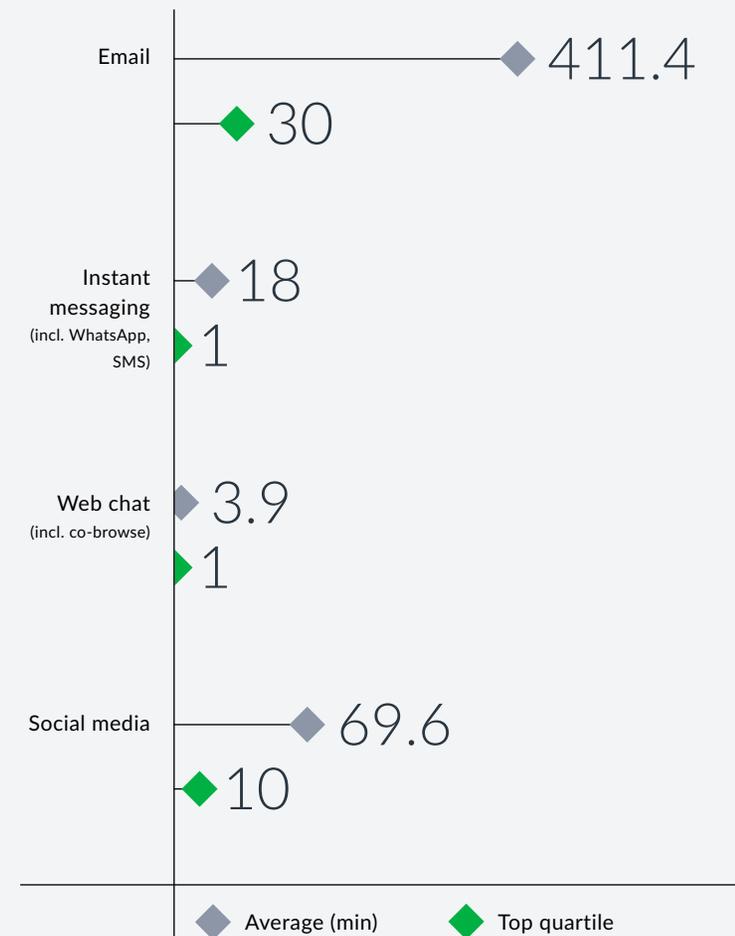
What does your organization consider as the top three benefits of AI and robotic automation?

Customer Services – B2C



Customer service response times by channel

Customer Services – B2C



2019 Global Customer Experience Benchmarking Report (c) Dimension Data

The Connecting Power of Messaging for Customers

Brands are finding it more effective to redirect traffic from traditional channels, like phone and email, to messaging. The main reason? Their customers are already there. As a result, when brands make the shift to messaging, they realize multiple benefits, both for customers and for their own internal operations.

Customer service organizations are taking their cues from today's messaging apps to deliver four major benefits to consumers, simply by allowing them to do the following:

1. Return to interactions later:

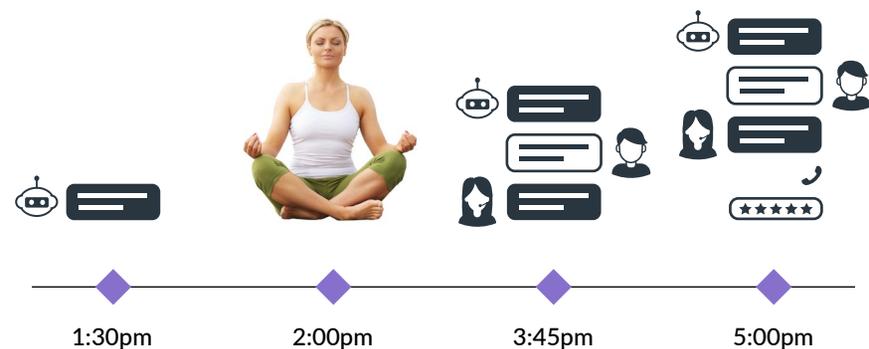
Using notifications and enabling window/browser closure, brands can allow customers to leave a chat for as long as they need and re-enter the conversation right where they left off – without losing conversation history. Access to conversation history is important to consumers who are used to messaging apps like iMessage and Facebook Messenger that store searchable conversation histories.

2. Move to a different device and channel:

Adding the flexibility of device-agnostic time-lapsed conversations makes the customer experience even more seamless. For example, on-the-go consumers who request customer support in a brand's mobile app can return home, switch to a laptop, and continue the conversation in a browser window.

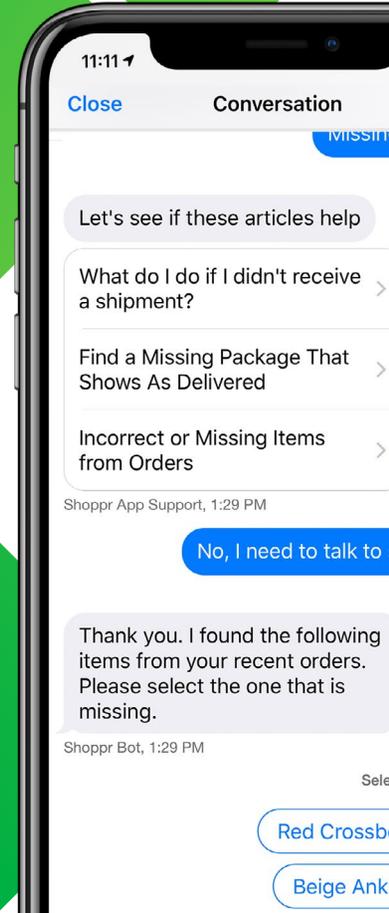
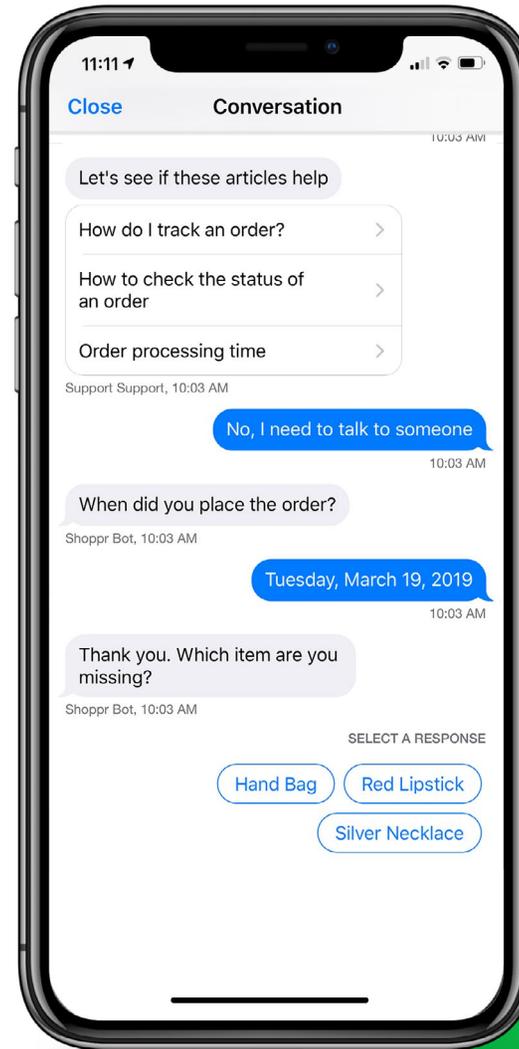
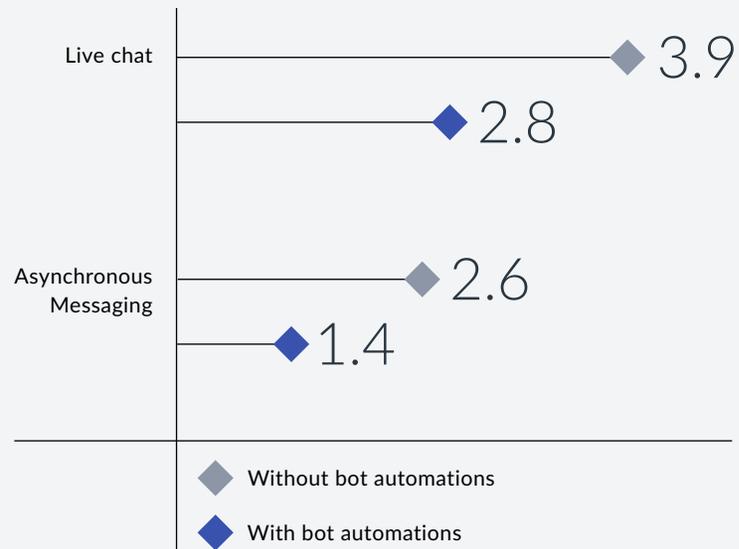
3. Engage in multiple conversations/activities at once:

Being sensitive to how customers lead multi-tasking lives is important. Async-enabled customer service messaging helps customers manage their daily routine without having to work around a brand's customer service restrictions such as business hours.



When analyzing our customers' aggregated data, we found that bots significantly reduce the number of average agent-sent messages per interaction within live chat and asynchronous messaging. When bots are used, the initial response time is almost immediate, and the time to resolution is also majorly reduced.

Average Agent Outbound Messages/ Case



The Connecting Power of Messaging for Contact Centers

Although driven by customer needs for a flexible, seamless, and personalized experience, contact centers also gain substantial operational benefits by deploying asynchronous messaging.

The messaging channel is far less expensive to staff and scale than phone calls, live chat, or even email. Plus, brands can support customers in either real time or whenever their customer service team has bandwidth, without forcing the customer to wait online for help. This strategy lets you prioritize urgent issues with live support while issuing email and push notifications to other customers once an agent has responded – bringing them back to the chat at the exact point where it was paused.

By incorporating bots into their messaging strategy, brands enable their customers and agents to have more efficient interactions, as customers can self-serve and bots can collect basic information that informs the agent-customer conversation.

Based on the numerous and substantial customer-facing and internal-facing benefits, a growing number of organizations are prioritizing their ability to manage an explosion in messaging-based issue volumes.

Dimensions

Time

Live chat

- Customers have to be online, and may experience long wait times and poor CX, resulting in 'abandons'
- Enough agents have to be available in real time, which is hard to staff
- Concurrency capped at 1:2 (Forrester found 1:1.8)

Messaging

- Customers get their time back and don't have to wait on hold
- Easier to staff
- Better agent efficiency (1:3+)

Context

- Limited to sessions
- Hard to share
- Repeating information is frustrating

- Persistent conversations enriches context
- No repeat of information necessary
- Allows personalization and re-engagement

Automation

- Limited to front-end self-service
- Self-service is siloed and not connected to agent assistance

- Bots and humans can work together via messaging

Enhancing Phone through Messaging

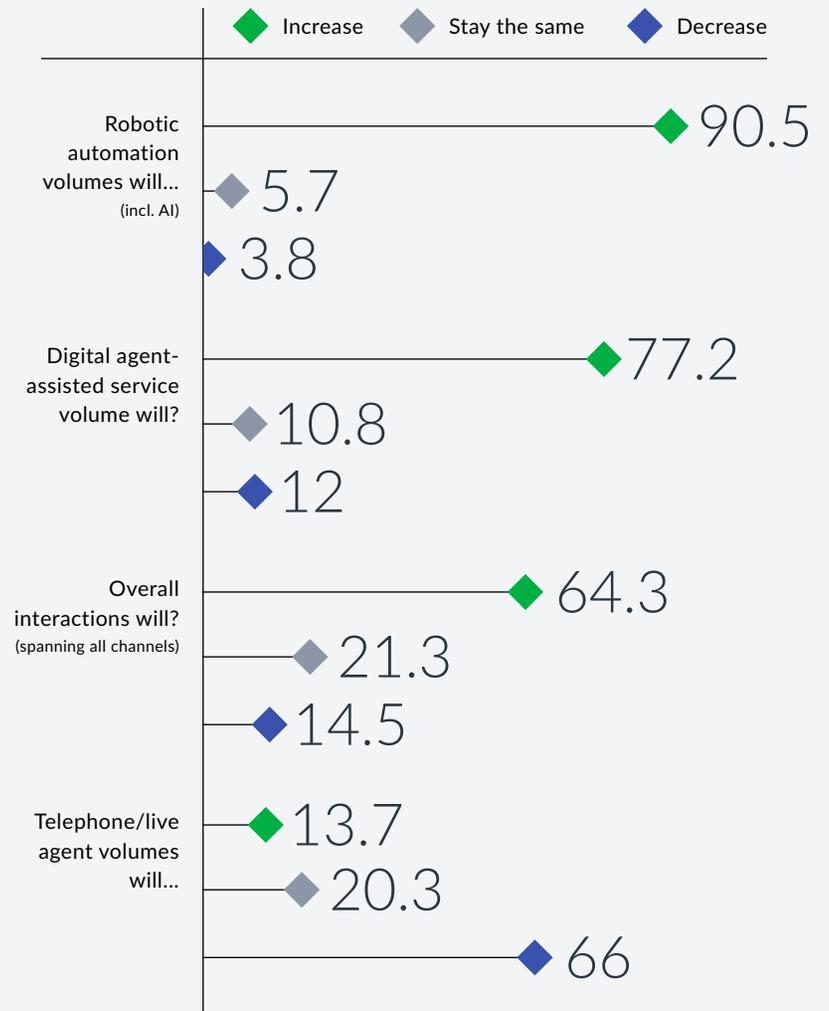
Phone will always remain an important channel for very specific and highly complex customer issues. Nevertheless, as people continue moving away from the voice channel, customer service organizations will de-prioritize it in favor of messaging.

Whereas almost 80 percent of consumers age 55 and above prefer the phone, fewer than half of those under the age of 26 want to engage in live phone interactions. This drove live phone conversations down to just 41 percent of all customer service interactions in 2017. And the gap of digital over phone is steadily increasing. Note the expected decrease in phone and live agent volume and increase in digital agent-assisted volume over the next two years per the 2019 Global Customer Experience Benchmarking Report.

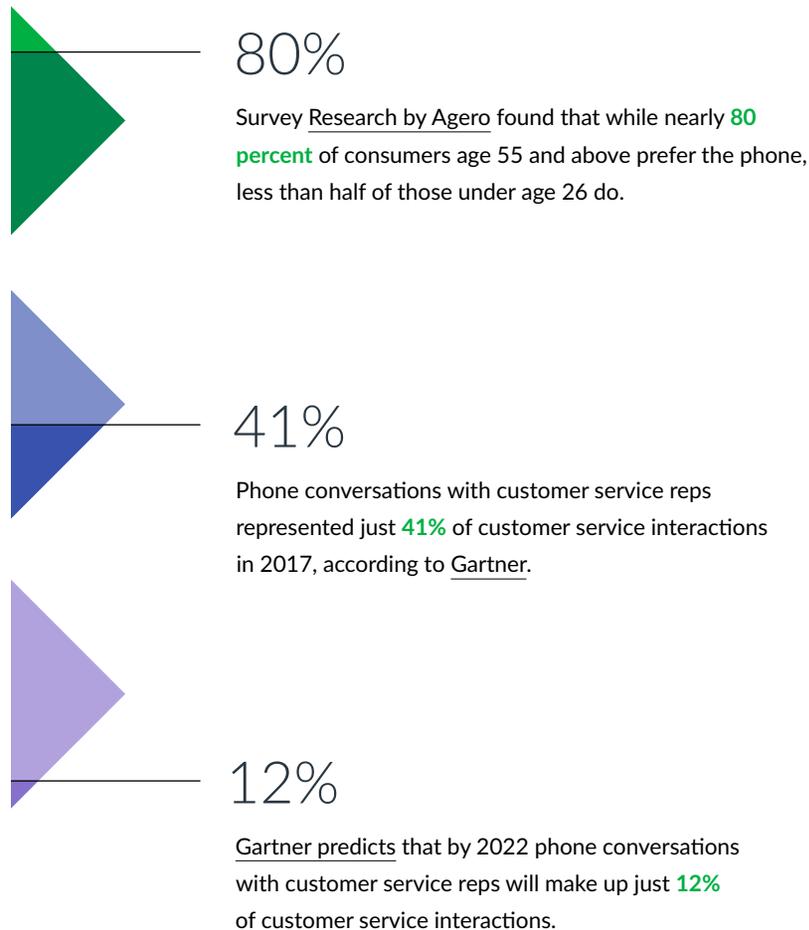
2019 Global Customer Experience Benchmarking Report (c) Dimension Data

Anticipated impact of AI, robotic automation, and digital transformation on CX operations in the next two years

Customer Services – B2C

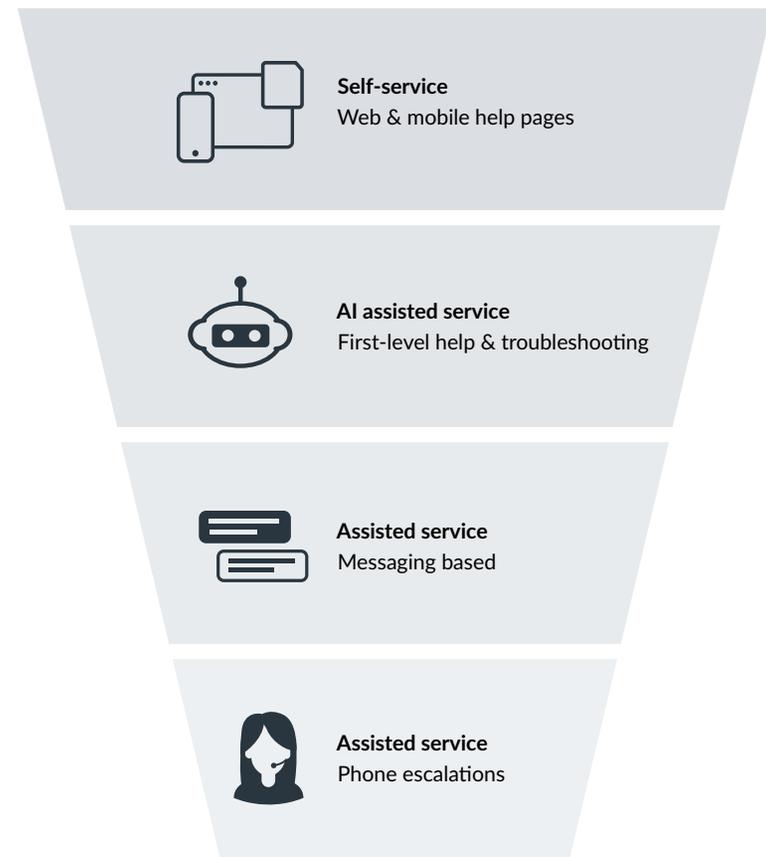


Why beef up your contact center to handle more phone calls when Gartner predicts that phone conversations with customer service will account for a mere 12% of service interactions by 2022?

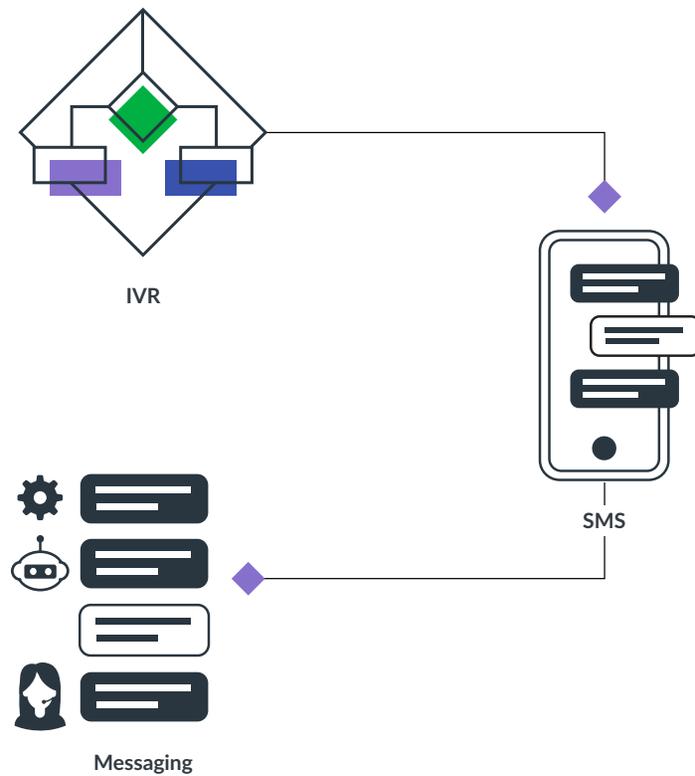


By its very nature, phone is more expensive than messaging since phone-based agents can only engage in one-on-one conversations versus working on multiple issues at once.

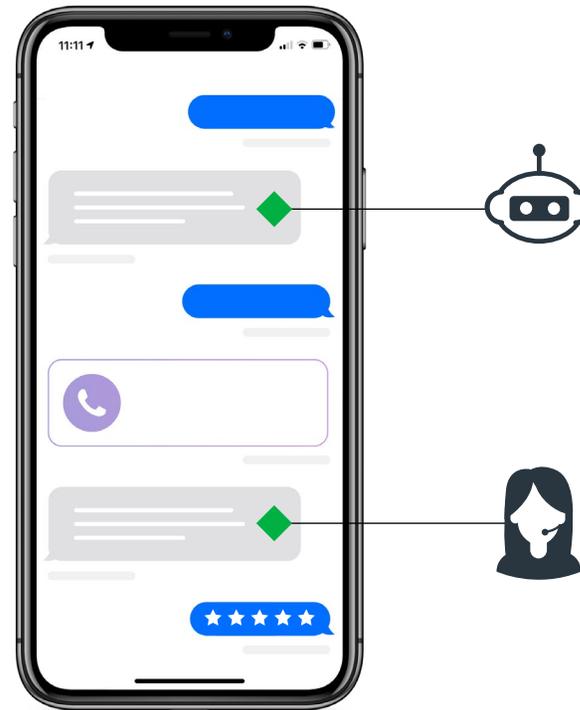
Still, customer service organizations need to support conversations over the phone for a subset of high-touch issues. Even though the phone should still be used, messaging helps minimize its usage. Here's how you should rethink voice in this messaging-centric era.



Customer comes in through a phone call: The IVR can offer to help the customer through messaging immediately (instead of waiting on hold) and send an SMS to prompt the start of a messaging conversation.



Phone serves as an escalation channel through messaging: Even after a customer tries to resolve an issue via a bot and a digital agent has jumped in to help, the customer may still need a live phone conversation for specialized assistance. Or, a customer can call through the brand's app and be directed to the right person who has all the context from the existing in-app conversation.



Customer would like a callback: Many customers don't want to wait on hold or navigate through an IVR. Instead, brands can offer to call back via messaging.

It's important for agents to have a single, data-enriched dashboard to address all channels. That's now made easy with data from bots as well as metadata collected from a messaging app's SDK. In addition, with Helpshift, the phone is also connected into the dashboard to include all conversation history.

The screenshot displays the Helpshift dashboard interface. On the left is a sidebar with navigation options: All New Issues, All Issues (34 Issues), My Open Issues, My Mentions, My Closed Issues, SHARED SMART VIEWS, and MY SMART VIEWS. The main area shows a list of issues with columns for issue type, status, and resolution time. The right panel shows a detailed view of a conversation with a customer named John Appleseed, including messages from a bot and an agent, and a final 'Resolved' status.

Issue Type	Status	Resolution Time
Missing an item	Resolved	3d
Returning an item	Resolved	10d
I'm missing an item	Resolved	11d
Return an item	Resolved	11d
missing an item!	Resolved	11d
Missing an item	Resolved	11d
I'm missing an item	Resolved	12d
I'd like to return an item	Resolved	12d
Missing an item		

Conversation Details:

- Customer:** John Appleseed (john_ecomm_live@helpshift.com)
- Device:** 7.3.0 - 12.2 - iPhone X (GSM)
- Queue:** Default
- Bot Message:** "Ok, you are missing Beige Ankle Boots. Sorry to hear that."
- Bot Message:** "Let me connect you to an agent who can help you with that."
- Bot Status:** Shopprr Bot: Missing Items is done interacting with the user
- Agent Message:** "Hi, my name is Shanthala. I'm here to help you with your missing item."
- Agent Message:** "It shows that the item was shipped on 03/01/19 and will be delivered in 2 business days. Would you like to schedule the delivery time?"
- Customer Message:** "Yes please"
- Resolution:** Accepted the solution (11d ago), Resolved (On March-7-2019 09:35 PM)

Connected Customer Conversations

The Many Paths a Question May Take



Use this infographic to see an example breakdown of tickets resolved by automation and agent-assisted channels.

With sophisticated automation, customers:

◆ Never have to wait on hold

◆ Can often self-serve and resolve their issues without an agent

◆ Have quick access to escalation agents for urgent issues

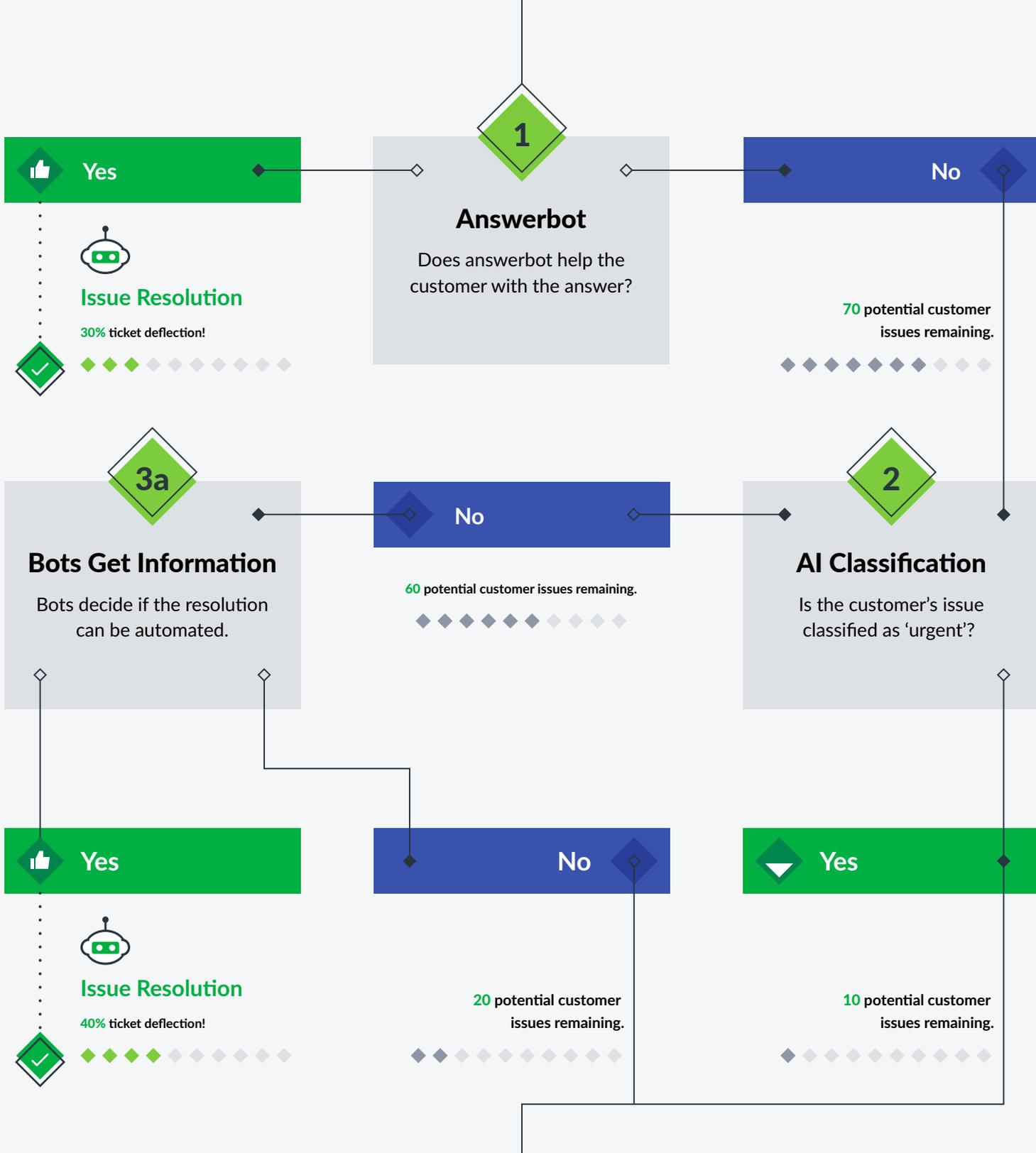
Start with **100** total incoming customer issues



◆ = 10 potential customer issues

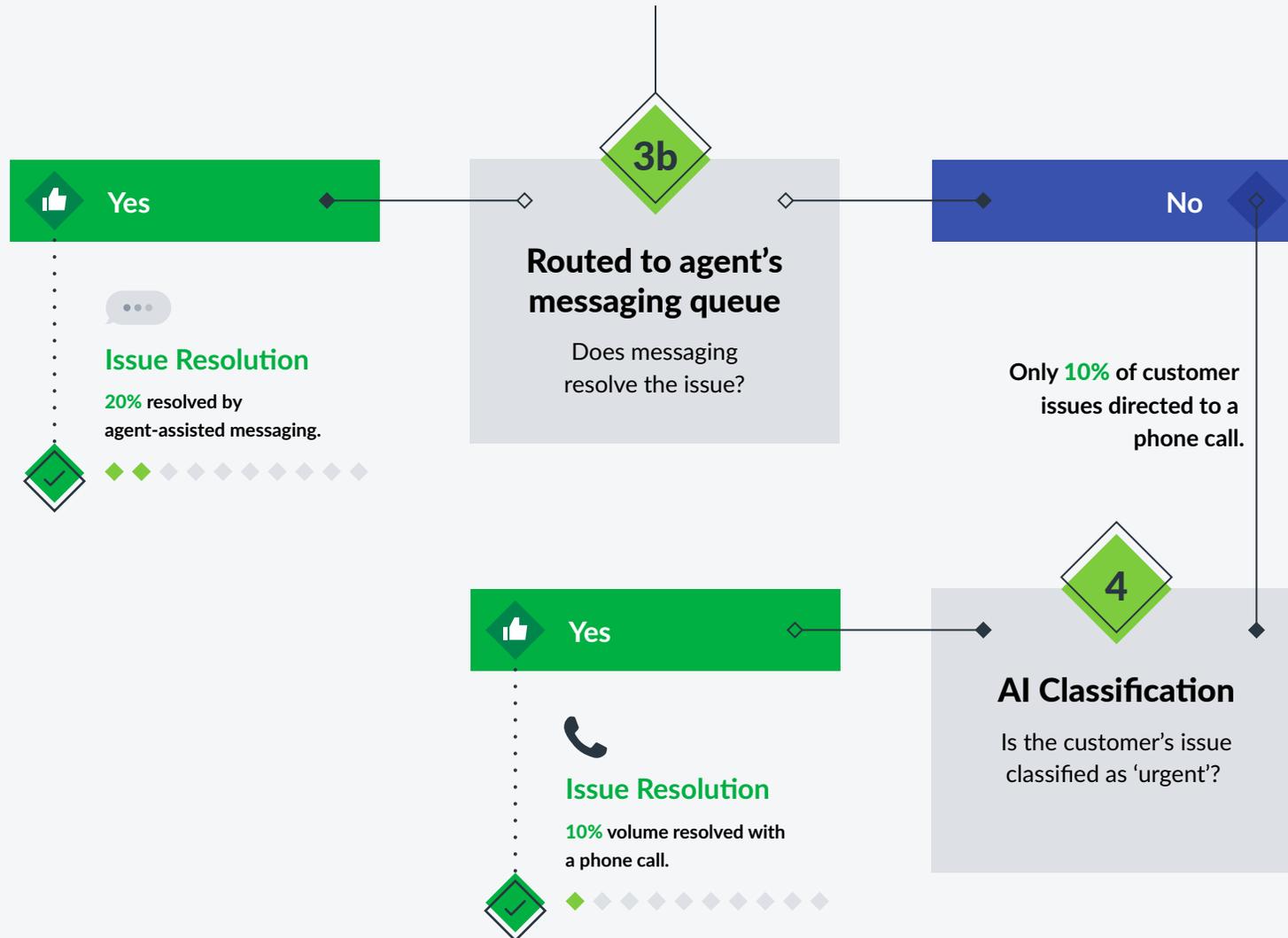
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Bot transfers remaining **30%** of issues to agents



Results

As seen in Forrester's ["How to Modernize Digital Customer Self-Service,"](#) an example Helpshift customers see:



90%

deflection of inquiries with self-service.



70%

of remaining inquiries handled by chatbots.



30%

of remaining inquiries handled by a combination of agents and chatbots.



It's Time to Level Up Your Digital-First Customer Service Strategy

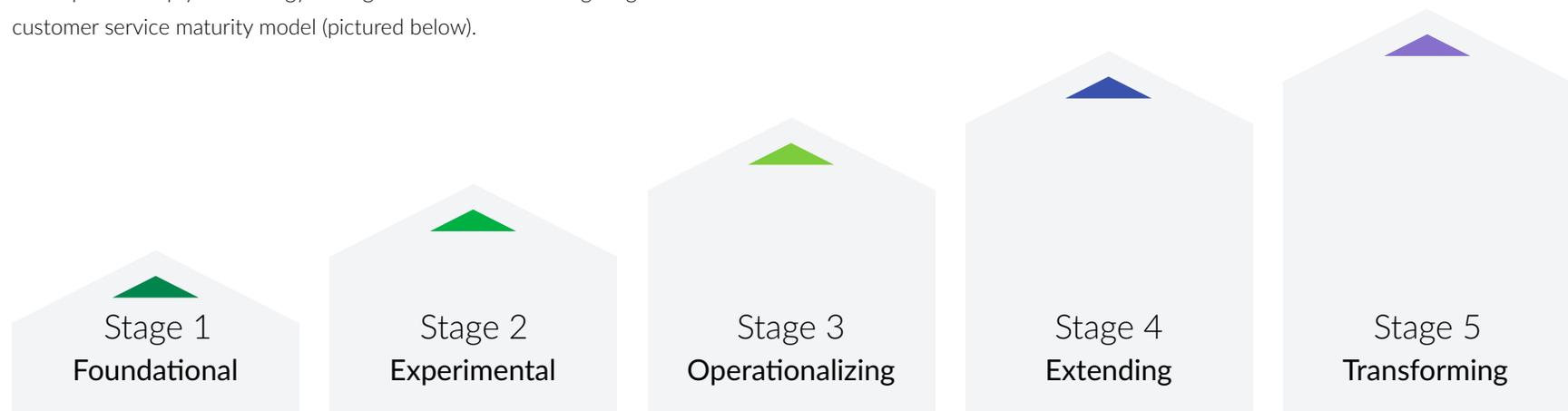
As customer service leaders formulate a strategy to move their organizations to the next stage of their evolution, it's clear that bots and automation are core pillars. Devising a roadmap to drive the organization forward is the first step.

Evaluate the Maturity of Your Support Organization

To know where you stand in your level of sophistication and readiness to apply the many valuable, advanced technologies available, you need to evaluate the maturity of your customer service strategy.

Most organizations fall within one of five distinct stages in their customer service journey, though there may be some overlap between stages. Read on for a description of each stage to see where you stand.

It's helpful to map your strategy through the lens of a five-stage digital-first customer service maturity model (pictured below).



Stage 1: Foundational

In the first stage, an organization has decided to follow a digital-first strategy, but has yet to implement it. This stage is critically important, as it lays the foundation for establishing an overall digital support strategy and helps you recognize areas that can be improved when moving to a digital-first approach.

Organizations in Stage 1 'get to know' themselves through an honest self-evaluation of their CSAT and an objective audit of their channel traffic. These two activities help to correctly segment customers and issues so that customer service leaders can identify which customers and scenarios they can handle digitally and which should be reserved for escalation to live phone interactions.

At the end of Stage 1, an organization begins to shift some of its customer traffic to message-based interactions.

Shift to a digital-first strategy

- Audit channel traffic
- Segment users and issues
- Reserve phone for escalation/VIP
- CSAT analysis

Stage 2: Experimental

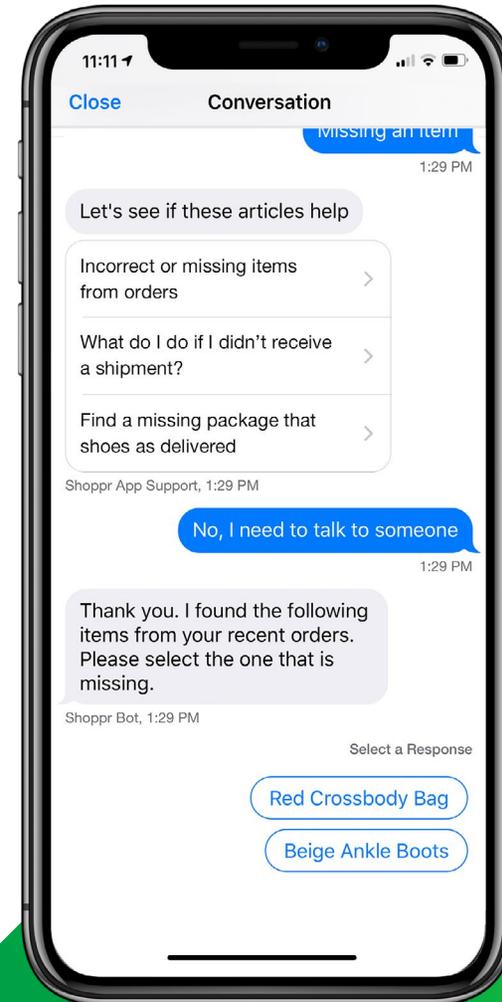
In Stage 2, an organization adopts asynchronous messaging and introduces natural language processing (NLP) and machine learning (ML) into its customer service processes, with answer bot serving as the first point of contact.

Introduce NLP & ML

- Issue classification
- Content development
- Self-service portal
- Answer bot
- Deflection analysis

To apply these advanced technologies, first classify all customer service issues and develop content that can answer/resolve specific routine issues (hopefully, the majority of them). A major effort in this stage involves optimizing knowledge articles so that the AI can route customers to the most relevant self-service content – which itself requires a careful deflection analysis.

Answer bots can point customers to relevant knowledge base articles.



Apply Modern Self-Service Options First

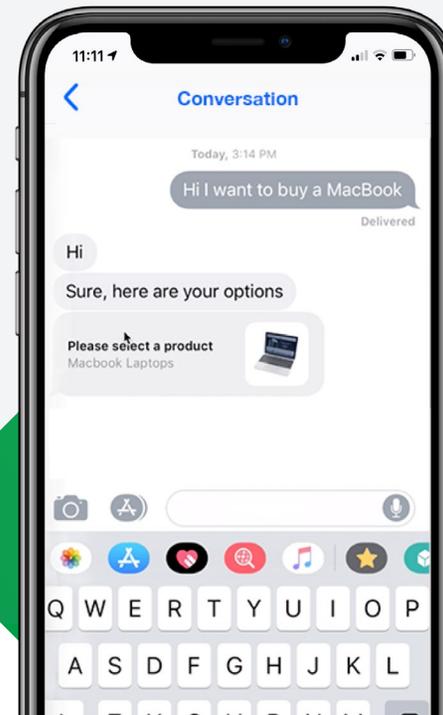
Regardless of where you are in your journey toward digital-first customer service maturity, you need to adopt modern self-service as your ‘first line of defense.’ That way you control costs by deflecting tickets away from agent support as much as possible.

Modern self-service is characterized by activities primarily driven through answer bot, and through the use of in-app and web portal-based knowledge articles (i.e., a knowledge base). The ultimate operational benefit of modern self-service is maximizing ticket deflection.

Answer bot can streamline the customer support journey and ensure the best possible customer experience – but only if the bot can tap into a robust and optimized knowledge base. Once a customer starts a chat-based request, for example, a bot can become the first point of contact and suggest relevant knowledge articles to address the issue. The more comprehensive and applicable your knowledge base, the more successful your self-service deflection will be. If answer bot can't find a knowledge source to address an issue, it can seamlessly pass the conversation to an automation bot or live agent.

Blending machine learning with answer bot enables your bot responses to continuously improve, making more intelligent suggestions for helpful content with ever-increasing accuracy, speed, and nuance. A greater number of your customers will enjoy instant service, while your organization reduces ticket backlog.

That being said, if your knowledge base includes incorrect or obsolete information, the answer bot will be “learning from” and suggesting the wrong information to customers. This underscores the importance of a fully optimized knowledge base to build upon as your support operations scale.



Stage 3: Operationalizing

By Stage 3, an organization has begun powering its self-service bots with artificial intelligence (AI) to elevate messaging as the primary support channel. At the same time, it uses workforce planning to adjust staffing levels and prioritize agent workload to align with the changes in issue complexity and volume of tickets going to agents.

Customer service leaders perform a pre-AI and post-AI implementation analysis of agent productivity to measure the impact of AI. Once they do that, they can formulate new service levels for SLAs and set customer expectations accordingly. To equip their agents to succeed, they should also train their agents on the nuances of handing support via messaging.

For example, train them to:

- Be conversational on messaging
- Keep responses brief
- Include emojis where culturally appropriate

Make messaging the primary channel

- Setting customer expectations & SLAs
- Workforce planning
- Training for messaging-based support
- Agent productivity analysis

Stage 4: Extending

In Stage 4, an organization is laying the groundwork to automate issues through its bots. It is already using bots mirroring the customer service organization's tone and personality to capture information and deflect tickets to self-service options. In addition to setting customer expectations for new support processes (particularly around self-serve), it is optimizing agent productivity and time to first response. The organization does this based on its analysis of stage 3 and processes introduced in stage 4.

Identify issue types for partial automation

- Bots for information capture & deflection
- Bot tone & personality
- Customer Expectations
- Optimize for the agent
 - Time to first response
 - Agent productivity
- Automation analysis

As customer service leaders begin to implement automation, they also need to reconfigure their management processes to reflect this change. That means leveling up agents and adjusting their teams so that they are equipped to handle only complex inquiries. It also means empowering supervisors to act as automation managers who ensure that the desired customer service experience is still being achieved with bots.

Increasingly technical backgrounds will be required for managers in order for them to adeptly supervise growing levels of automation.

With bots, your brand can:

- Fully automate categories of issues that are standardized, repetitive and create high ticket volume
- Enable customers to resolve common issues themselves, within minutes
- Ensure that agents have time for complex, high-value customer issues

Stage 5: Transforming

Automation allows customer service teams to create their own workflows built around frequently asked questions and common ticket use cases, in order to optimize the time that agents spend actually inside of conversations. In Stage 5, the highest level of customer support maturity, an organization has combined AI and automation so that bots handle nearly all support issues from end to end, with 30 to 80 percent of workflows fully automated. By integrating customer service with back-end systems and calling upon AI, the customer service team is using bots to deliver new insights that shape how both agents and the broader organization best handles various issues.

With digital workflows fully incorporated into processes, the customer service team is now making giant leaps forward in service-level guarantees over all previous stages. These strides hinge on the organization's efforts to ensure seamless handoff from bot to agent and vice versa, and to train their agents on the necessary skills to excel in this environment.

Realize world class automation performance

- 30-80% automation
- Backend integration
- Bots to agent handoff
- Agent skill training
- AI insights

Get the Biggest Payoff for Your Digital-First Approach with AI and Automation

It should go without saying that if you're still using phone or email as your primary support channels to handle more than 10,000 tickets a month, it's time to move volume to messaging. In fact, making the move to messaging-based support is table stakes: customer service leaders need to embrace asynchronous messaging augmented by automation to get ahead. With that in mind, here are the must-have features to adopt:

- **AI-powered answer bot to supplement a well-developed knowledge base:** When a bot suggests relevant knowledge articles, your customers receive immediate responses and are often able to self-serve, reducing agent backlog in the process.
- **Automation bots to collect information and automate workflows:** Customizable, decision-tree based bots can respond to inquiries immediately, collect and record user and issue information, and even resolve issues in certain categories. This also reduces backlog and allows your agents to solve issues with fewer interactions.
- **AI-powered issue classification to reduce transfers:** By using this feature to assign relevant tickets to bots and agents, you reduce transferring between agents, and more efficiently help customers.

The brands that leverage all three of these features to supplement their messaging-based service improve their CSAT and increase operational efficiency to the greatest degree.

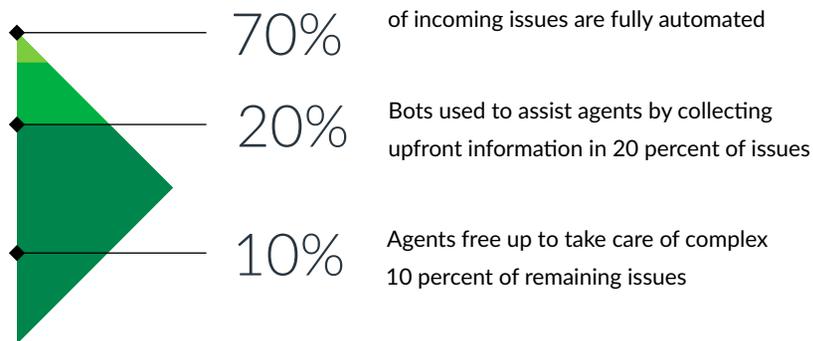
Expected Results: The Payoff of Automating

Brands that have integrated bots and AI throughout their back-end operations and front-end customer journey are seeing impressive results in agent efficiency, ticket resolution time and customer satisfaction.

Gaming

- 70 percent of incoming issues have been fully automated without affecting CSAT scores
- Bots have been used to assist agents by collecting upfront information in 20 percent of issues
- Agents freed up to take care of complex 10 percent of remaining issues

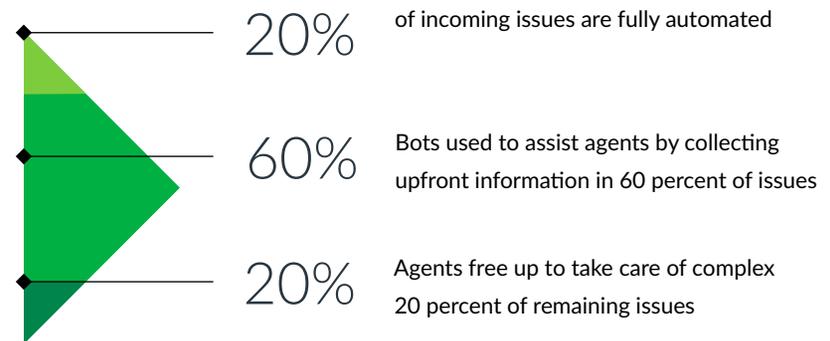
Issue automation breakdown



Entertainment

- 20 percent of incoming issues have been fully automated alongside a full point increase in CSAT
- Bots have been used to assist agents by collecting upfront information in 60 percent of issues
- Time to resolution for issues involving bots and agents has improved by 25-50 percent

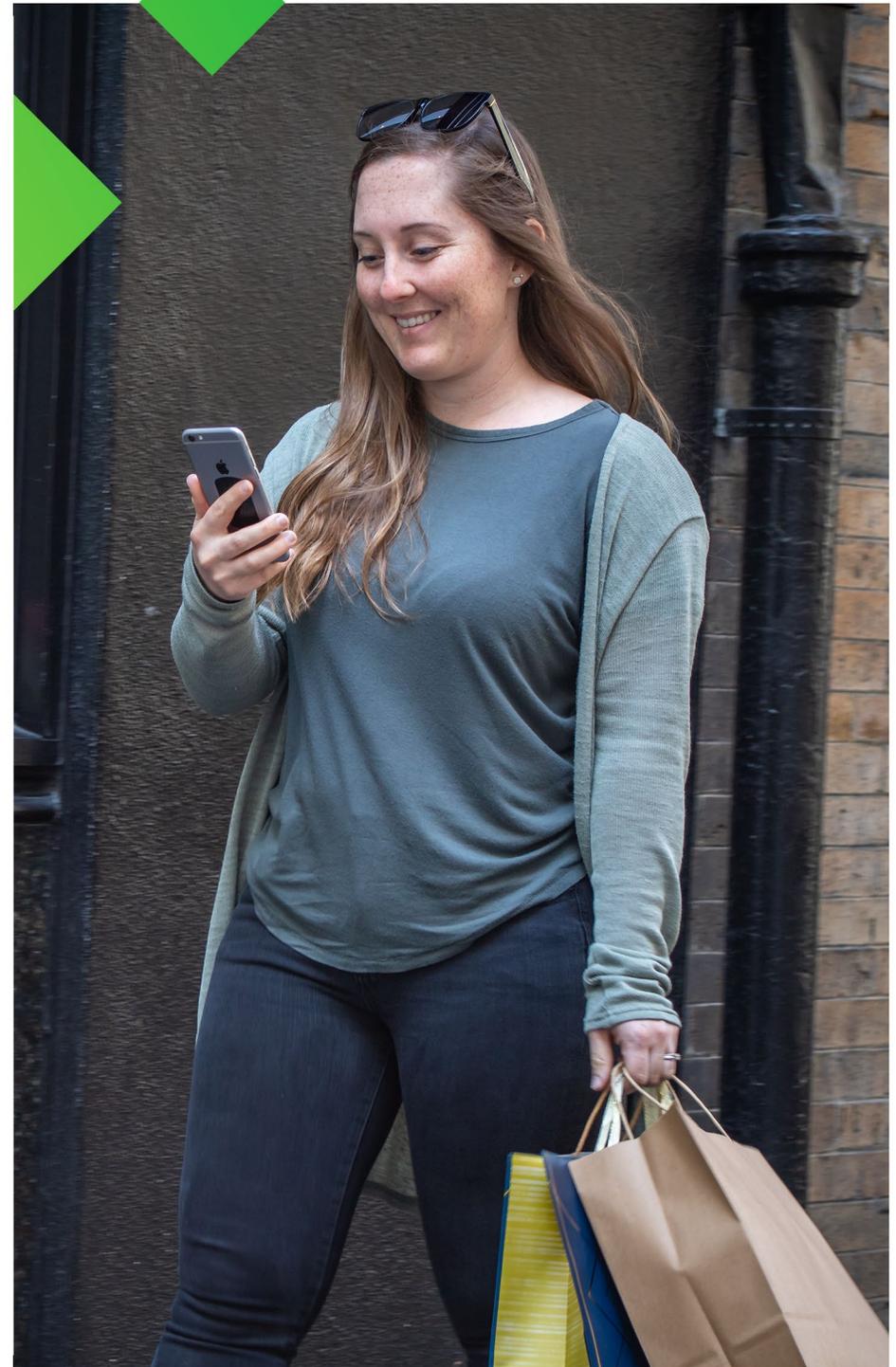
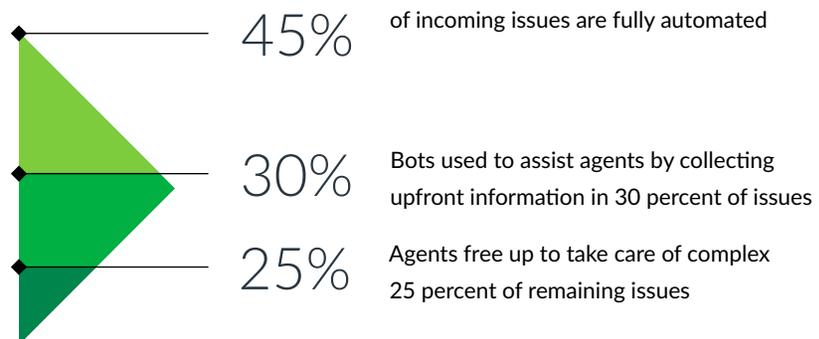
Issue automation breakdown



Retail

- 45 percent of incoming issues have been fully automated without affecting CSAT scores
- Bots have been used to assist agents by collecting upfront information in 25 percent of issues
- Agents and bots combined have been able to handle twice the amount of tickets within a given time period

Issue automation breakdown



Take Your First Steps Toward Digital-First Customer Service

Even now that you understand the benefits of and high-level strategy for digital-first customer service, you may mistakenly believe that transitioning to digital is easier said than done. It may seem daunting to implement this new digital channel while managing day-to-day support operations, especially if your customer service center is heavily based on call volume or email.

But with the right customer service platform, you can implement asynchronous messaging simply by embedding a single line of code. Just copy and paste!

Getting started with messaging really is that easy. But we're not going to lie – using the channel and all its capabilities to the fullest takes a bit more planning and preparation. Here's how to do it once you've decided on your [digital-first customer service platform](#).

Step 1: Align with Business Objectives to Justify Your Initiative

As previously demonstrated, investing in digital strategies — from frustration-free automation to asynchronous messaging — can yield a substantial increase in CSAT, and greater operational efficiency overall. To justify investment in automation bots and messaging to stakeholders, start by sharing the benchmarks sprinkled throughout this guide.

To then make a case for messaging as a primary channel, identify powerful business objectives and a clear path to success. Isolate these objectives and then figure out how to measure the ROI.

Here are some examples of business objectives and their corresponding business justification:

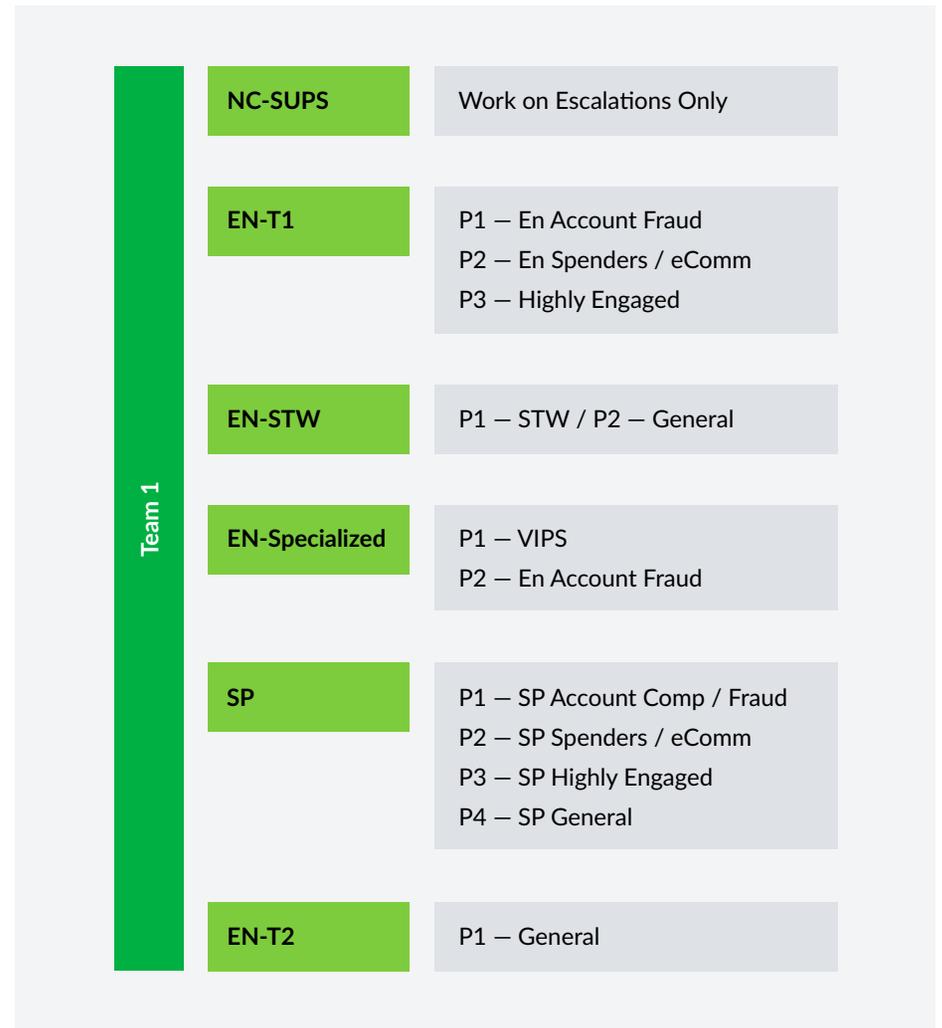
- **Higher CSAT:** Is customer satisfaction an important metric? If so, consider the time consumers can save by messaging back and forth with an agent without having to wait on hold or in a browser window or be transferred multiple times. Consumers value their time, and they value the brands that honor this.
- **Increased Conversions:** If your organization sees customer service as a way to increase revenue, providing live help mid-purchase is a proven way to go.
- **Lower Costs:** Most brands want to reduce operational costs. You can significantly reduce costs by optimizing self-service through bots and automation – something only accessible through messaging.

Step 2: Group and Train Your Agents

Your next important task is determining how to organize teams within the digital side of the support organization in order to staff this new channel.

As you know, you can group agents by geography, function (e.g., Billing, Fraud, Operations, etc.), outsourcing partner companies, language, or skill. This grouping ensures you route issues to the agents most qualified to resolve them as quickly as possible and with minimal transfers.

Don't overlook the time needed to properly train your customer service team. Your agents need to get familiar and comfortable with a new support dashboard, and be trained on proper chat etiquette – which is quite different from email and social channels.



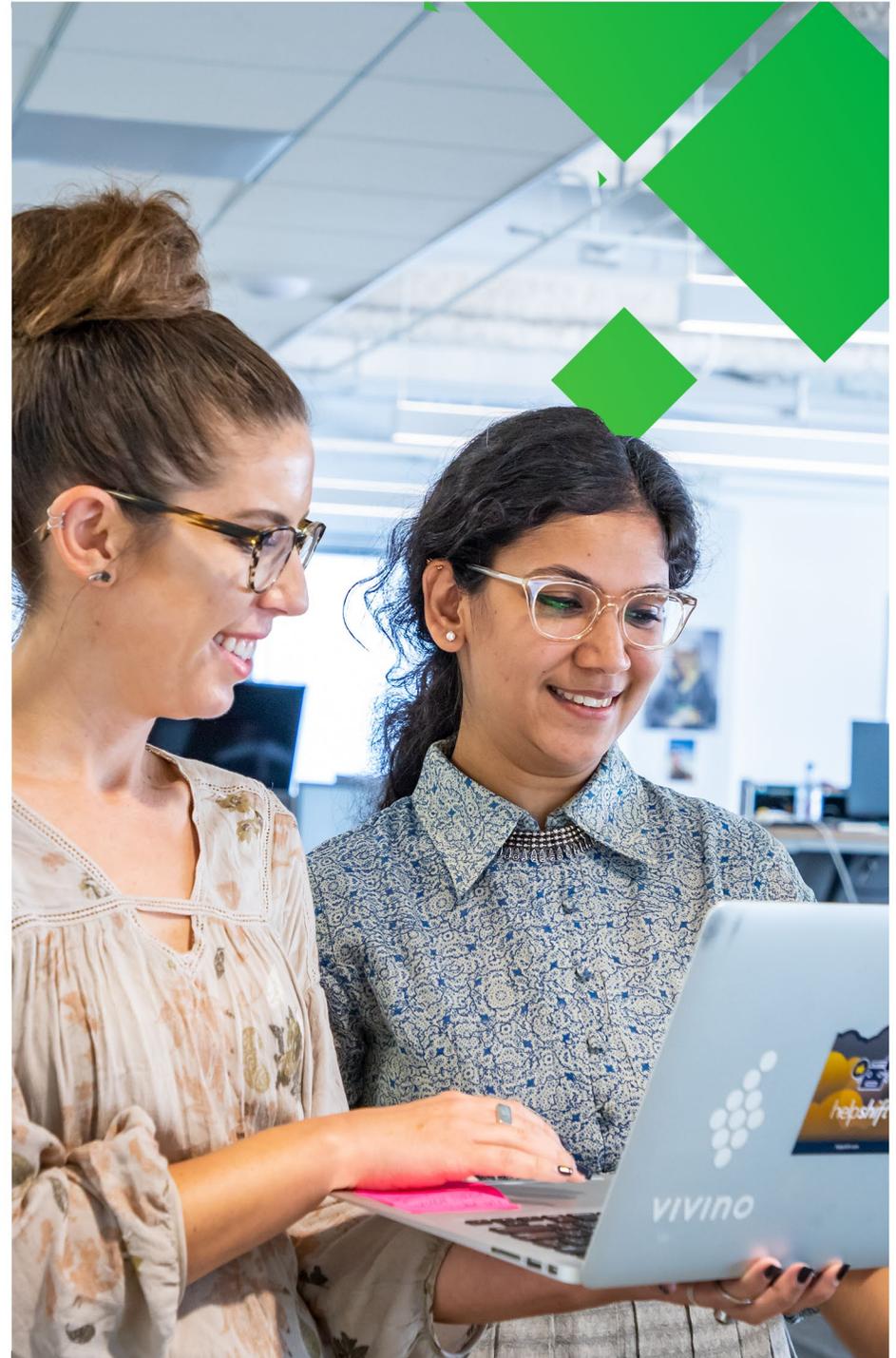
Grouping agents ensures issues are routed to the ones most capable of quickly resolving them.

Step 3: Set Up a Knowledge Base

A core benefit of messaging-based customer service is that you can offer effective self-service that encourages customers to resolve issues on their own. And you can achieve this vision by embedding a bot within the messaging thread to enable an entirely conversational self-service experience, and/or through an easy-to-navigate help center.

Both options require you to create and optimize a robust, up-to-date knowledge base. Here are some useful guidelines:

- **Create Sections:** Organize all knowledge articles into common categories so customers can easily find what they are looking for.
- **Be Concise:** Remember that most customers are on their mobile devices, so keep each article short and succinct.
- **Use Images and Videos:** Many users learn visually, so include images, videos, and GIFs to promote easy understanding.
- **Optimize Search:** Incorporate the terms and keywords that customers are likely to search for, and account for common misspellings.



Step 4: Configure Workflows and Automations

If more than half a dozen agents will be responding to messaging tickets, make sure you configure your workflows so issues are triaged, routed, and resolved as efficiently as possible.

To that end, you will need to:

- Establish queues and labeling systems that group issues based on issue type or customer category.
- Configure rules (based on keyword tagging or machine learning) that assign issues to specific queues or agents, send auto-responses, trigger bots, and more.

Take advantage of unique workflow capabilities via messaging:

- Use bots that provide conversational self-service and automate routine tasks like collecting information before routing tickets to agents.
- Enable turnkey machine learning algorithms that automatically triage and classify incoming issues.
- Set up highly customizable push notifications that alert customers of any updates.

Configure dashboards to boost agent productivity:

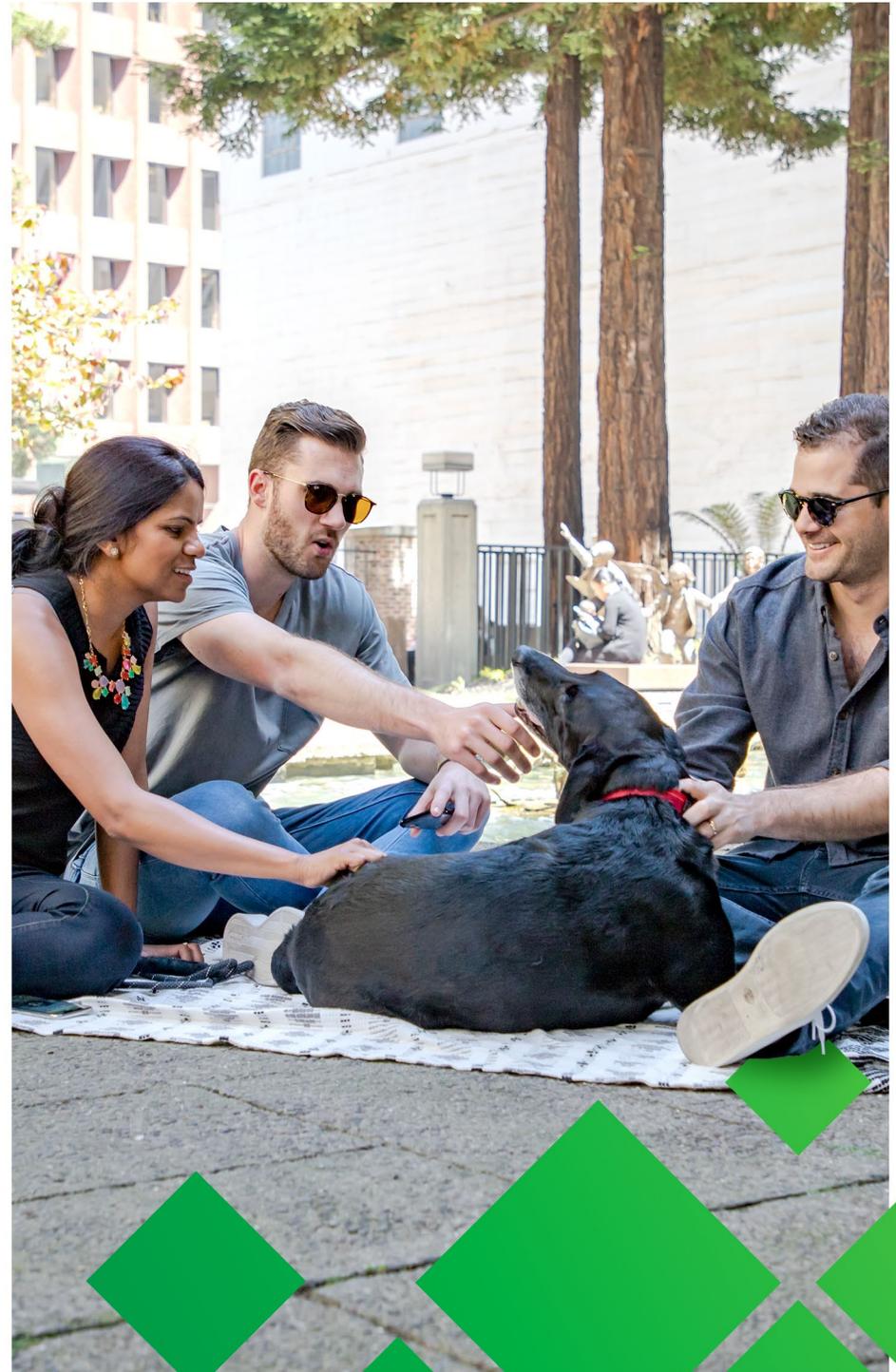
- Create message templates for common conversational elements to help agents quickly respond to customers.
- Craft agent suggestions that provide immediate answers to frequently asked questions right within the support dashboard.

Step 5: Pilot with a Small Group of Customers

Once you've set up your teams and workflows, it's time to test customer service via asynchronous messaging. Since you want to provide a positive experience, it's best to slowly roll out this new channel to customers. That way you avoid a flood of customer service requests via a new channel, giving you and your agents time to get acclimated. You may be dealing with unpredictable volume initially, and don't want to frustrate customers with excessive backlog or incorrectly routed issues.

Start by rolling out to 20 percent of your website users or by making messaging available via only a few critical pages like the checkout page.

Another option is to restrict live messaging access to specific customers based on meaningful criteria such as spend, VIP status, or shopping cart value.



Step 6: Monitor, Learn, and Expand

During the initial weeks or months following launch, you want to understand how customers are reacting while closely watching operations.

- Keep a close eye on CSAT for a strong indicator of how customers view this new support channel.
- Closely monitor the number of hourly and daily incoming chats, and watch for backlogs. Use this information to tweak staffing and workflow configurations so you can meet demand.
- Leverage analytics to evaluate the impact of messaging-based support in light of your previously identified objectives. If your goal is to reduce costs, an FAQ deflection report can be helpful, for example. The deflection rate indicates the number of potential issues prevented through self-service, which equates to a significantly lower cost of support.

Once messaging is set up and working to your satisfaction, you can gradually roll it out to your entire customer base.

Now that you've established a messaging channel, here's how to get started with automation.



After checking these boxes, you'll be ready for more advanced automation.

-  Identify business objectives and justify to stakeholders
-  Group and train agents
-  Set up knowledge base
-  Configure workflows and automations
-  Roll out to a small audience
-  Monitor, learn and expand

Next Up: Further Enhance Your Digital Channels with Automation

Bots are computer programs that simulate human conversation, and you can design them to be auditory or text-based. The latter is popular among those using leading messaging platforms, such as iMessage and Facebook Messenger, and as a tool for companies offering web-based sales and support.

The customer service bot specifically represents a unique subset of the bot ecosystem since it doesn't try to sound human or engage users in small talk. Instead, its purpose is to rapidly lead customers through a streamlined channel of information as efficiently as possible. So, unlike other bot types that require more generalized and sophisticated AI, customer service bots function well without a sophisticated level of comprehension; they simply make the customer inquiry process more efficient and pleasant.

The Helpshift customer service bots are perfect examples of chatbots that **do not** rely on AI to function. Instead, Helpshift applies AI only at the opening of a conversation to identify the issue type, classify it, and offer up any knowledge content that may help the customer.

All Helpshift bots (except for answerbot) are 'decision tree' bots and have absolutely zero reliance on AI. Under the decision-tree approach, these bots present customers with guided workflows. Essentially, each step in the decision tree is an option selected by the customer, and the selection dictates the flow for that specific use case.

Helpshift bots can integrate with any API-enabled system (no need to write code), so Helpshift customers can fully automate customer interactions for virtually any issue type.

Now, using bots and automation may sound like customer service leaders are ceding control. However, human agents always maintain control of the conversation as agents can both delegate to a bot and take back control from a bot at any point.

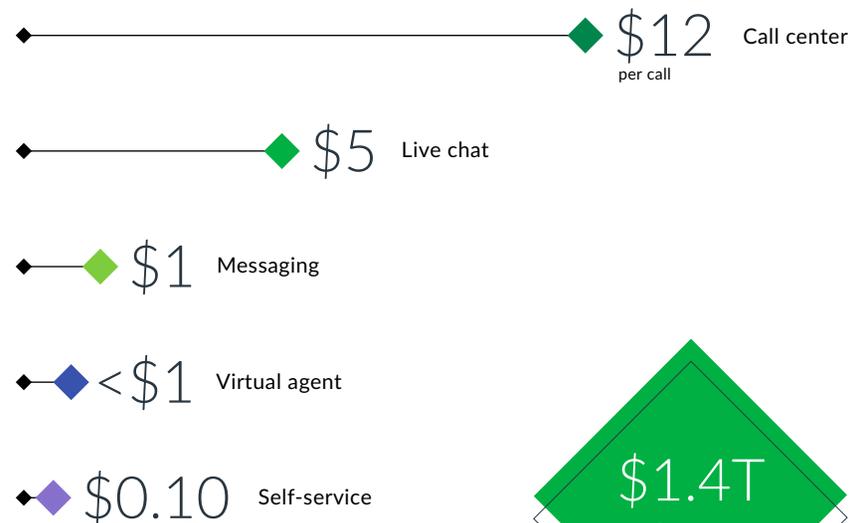
Bots can be amazingly successful, as long as you don't expect them to behave like people. In fact, bots for customer service work great when they are automating robotic work – work that humans shouldn't really be wasting their time on in the first place.

The customer service bot addresses two operational challenges:

- 1. **Scalability:** The need to support personalized interactions at scale
- 2. **Speed:** Customer expectations for instantaneous service

Both challenges underscore the problem with over-reliance on humans in customer service. Not only is it expensive and difficult to staff a high-scale operation, human agents are slower to respond than bots, even when you have enough agents available.

Human-assisted customer service is expensive

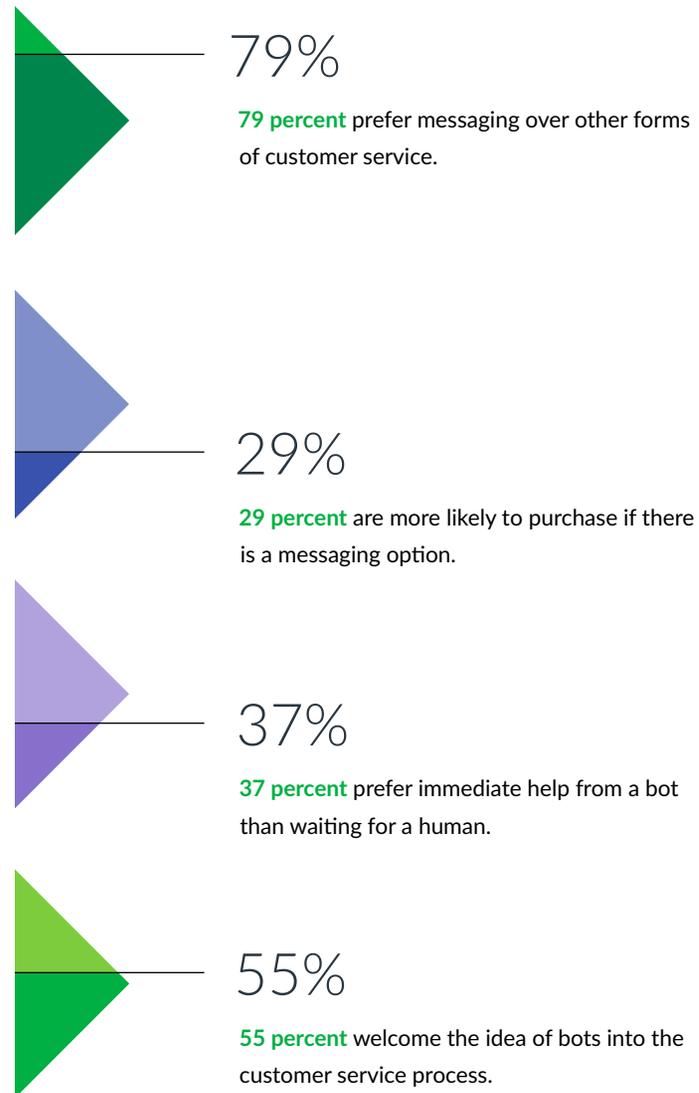


Bots are far less expensive than live agents.

Unlike humans, bots are consistent and infinitely scalable. While a messaging agent can manage just 2 or 3 tickets simultaneously, bots will always provide instant responses — even when facing a massive ticket influx. Moreover, they maintain the same “voice” while agent disposition can vary during times of stress. Maintaining this level of speed and consistency is crucial in a world where 73 percent of customers say that valuing their time is the most important trait of good online customer service.

That said, ignore messaging as a support channel and you will likely see lower revenue and CSAT scores. That’s because 29 percent of consumers are more likely to make a purchase with the option of messaging (even if they don’t use it). And 79 percent of customers say they prefer messaging to other forms of customer service. This is where bots come into play.

More than 37 percent of customers say they would prefer to get immediate assistance from a bot rather than wait just three minutes for a human, and 55 percent say they would welcome the idea of bots in the customer service process. It’s easy to see why: Bots respond instantaneously, using prompts and suggestions to quickly lead customers to an answer.



An Example Customer Journey with Five Bots

A bot is ideal for beginning a customer support journey. In fact, a journey should rarely begin with a human-to-human interaction since bots can collect basic information faster than a human and make instantaneous decisions based on it.

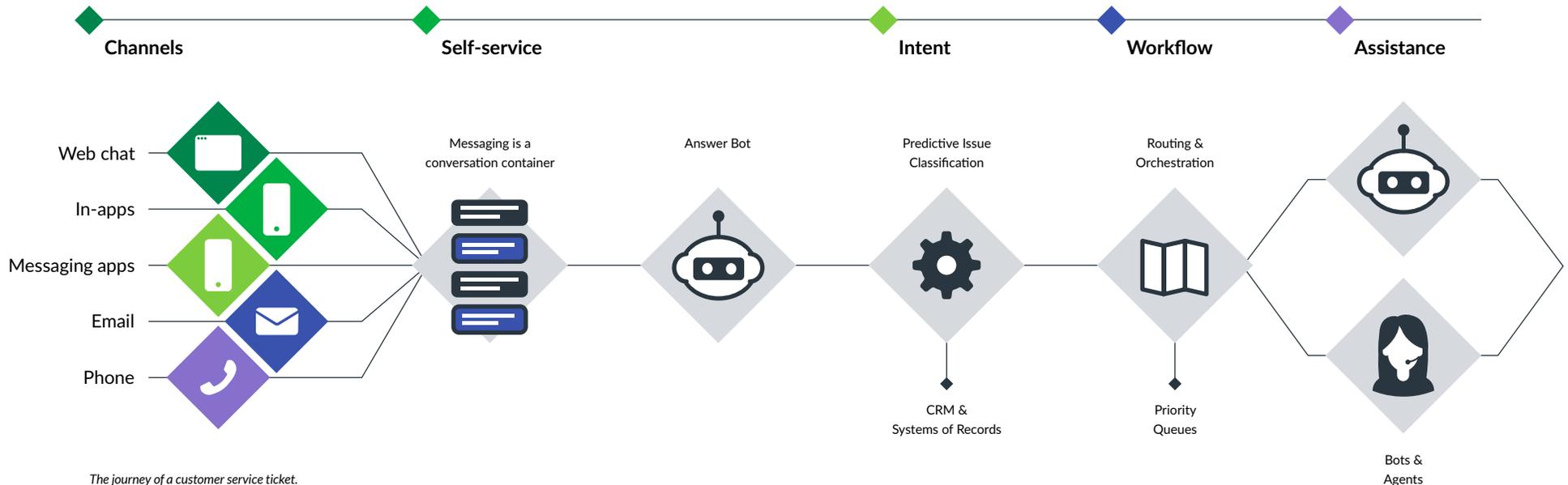
Consider, for example, a scenario in which a customer deleted an email with shipment tracking information and contacts customer service to retrieve the tracking number. Upon receiving the customer's initial message, an AI engine could immediately parse the text and offer knowledge articles via answerbot based on categories such as 'Shipping', 'Account Login', and 'Payment Issues'.

Once the customer reads the article on shipping issues and requests additional assistance, a second bot could collect additional information and present a list of the customer's most recent orders.

When the customer selects the applicable order, a third bot would present options for potential shipping issues/actions — 'Return Item,' 'Shipment Tracking,' 'Problem with Item,' etc. When the customer selects 'Shipment Tracking,' a fourth bot instantly gives the tracking number and latest shipment update.

Throughout this customer interaction, there was no need for a human agent. By introducing bots into this type of routine request, you can fully automate support for many customer issues, reducing ticket backlog and reserving agent time for more urgent or complex requests.

While an agent does not begin the conversation, you should always provide options for the customer to select 'none of the above' or 'article not helpful' and be immediately routed to an agent. This helps avoid potential frustration and inefficiencies.



To help you get started building your own customer service bots, we've outlined below when to use them in the customer journey to maximize their impact on speed, CSAT, and scale.

Step 1: Use answer bot as a first line of defense

Answer bot suggests knowledge base articles that address customer inquiries. For instance, if a customer asks, "Where do I see my purchase history?" the bot could suggest an article, GIF, or video from the knowledge base and show where to find it.

Answer bots call upon machine learning to gain intelligence and improve accuracy over time by gathering customer feedback. After offering self-service options, the bot can let the customer indicate the helpfulness of the selected knowledge content. Support teams and bots alike gain visibility into which content is most helpful and can adjust accordingly.

Step 2: Automate Issue Selection and Categorization

Thanks to machine learning, the customer support platform can automatically classify issues with extreme accuracy. Bots then leverage these classifications to deflect tickets using automated workflows or route customers to the correct agent when deflection is not possible. Even when routing to an agent, the process is streamlined because automations ensure the agent receives all ticket information without having to ask the customer.

Step 3: Invoke a Bot to Collect Additional Information

Agents spend significant time going back and forth with customers to gather basic information, such as their name and account number. In fact, this often makes up the bulk of an interaction – more time than addressing the actual customer issue. A bot can change that by greeting customers and prompting them to enter their basic information up front—before a human is contacted or a ticket created.

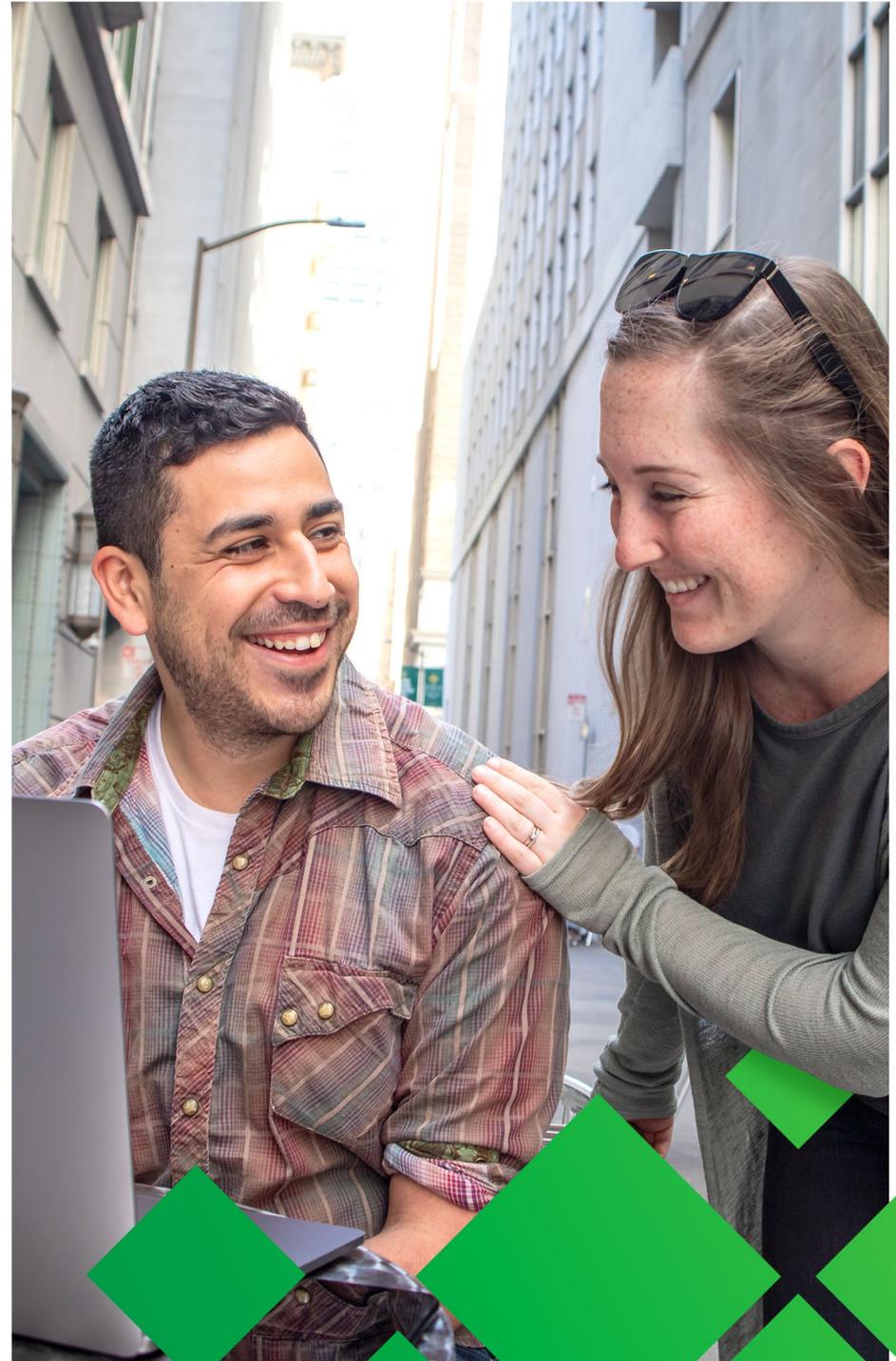
Bots can even present options for a wide range of details like device type – such as options to choose iOS or Android. Bots can then add this information to the ticket, once the ticket is created. The bot can even suggest options, such as by presenting the last five items the customer purchased and asking the customer to click on the one they want to return.

Step 4: Deploy Use Case Specific Bots

You can easily customize bots and inject them into conversations to lead customers down a unique path based on their issue. As an example, for customers locked out of their mobile gaming account, a bot can collect their security data and work with the internal CRM to unlock the account. For customers still unable to access their account, the bot can connect them to the right agent who already has much of the information needed to assist. Depending on the use case, bots can collaborate with users prior to opening a ticket.

Step 5: Collect Feedback

Whether a bot has handled all or part of an interaction, you can still use it to collect feedback as the final touchpoint between the customer and your brand. Unlike traditional forms of feedback collection like email surveys, a bot follows up immediately upon issue resolution and within the existing conversation thread. By asking for feedback in real time, bots eliminate an extra step on the part of customers and make the feedback loop seem like a natural part of the conversation. As a result, more customers provide feedback and CSAT ratings.



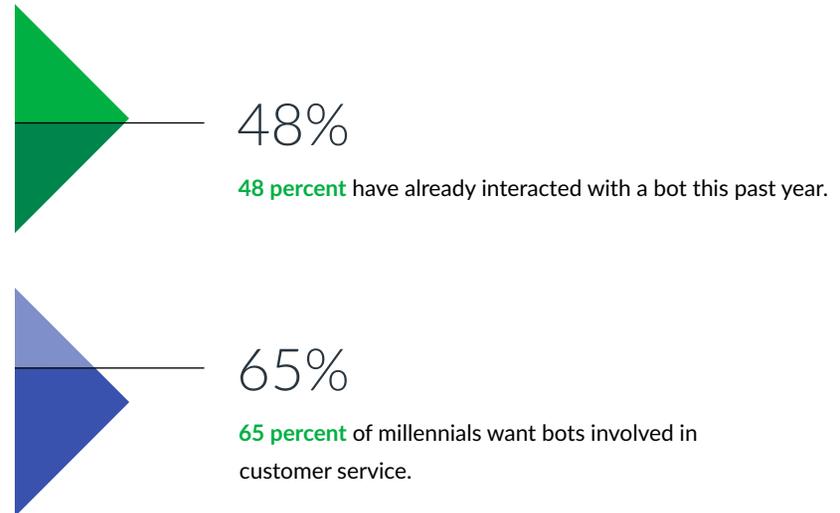
Start Building Your Own Bots

Your customer service journey probably resembles the one we outlined earlier, except that your agents or supervisors might handle each step manually.

Using bots to automate aspects of the customer journey, you can improve your critical customer support metrics, including:

- **Higher first contact resolution**, as both agents and customers receive the information they need to resolve tickets during the initial interaction.
- **Lower ticket volume** due to optimized and highly utilized self-service options.
- **Optimal time-to-first-response** as all customers receive immediate initial responses.
- **Improved CSAT ratings** due to faster, more efficient service for routine requests, and live agents who can focus on resolving complex issues.

Many top companies have already integrated bots into their customer service journeys. According to a recent Helpshift survey, 48 percent of consumers have interacted with a bot in the past year for customer service inquiries, and 65 percent of millennials want bots involved in the customer service process. Bot-based service is quickly becoming the new norm, enabling brands to prioritize both operational efficiency and customer satisfaction.



Worksheet: Lay the Groundwork for Automated Customer Service

To ensure you automate as many of your customer service interactions as possible, you need to define the types of support requests you will resolve using a combination of bots and automation. To get started, use the 5-step worksheet that begins on this page.

Step 1: Categorize your tickets

List your top four most common incoming ticket categories by volume. (Ex. *Payment, Shipment Tracking, Forgotten Password, Returns*).

1. _____
2. _____

3. _____
4. _____

Step 2: Pick a category

Which of the categories above can your agents most easily resolve by following a script or referring customers to a knowledge base article? (Ex. *"Payment"*).

1. _____

Step 3: Describe the issues within the category

Identify the three most common tickets within this category. (Ex. "Payment page not functioning").

- 1. _____
- 2. _____
- 3. _____

Step 4: Decide what information you need to resolve each ticket

For each of the issues above, list the information that an agent would need to collect in order to find a resolution. (Ex. Browser type, payment method, session length).

- 1. Ticket inquiry: _____
Information needed: _____
- 2. Ticket inquiry: _____
Information needed: _____
- 3. Ticket inquiry: _____
Information needed: _____
- 4. Ticket inquiry: _____
Information needed: _____

Step 5: Identify the most common resolutions for each ticket

For each ticket, include an “escape hatch” — a way to escalate from a bot to an agent when you have no digital-based way to resolve the ticket. That way if the issue is not resolved, it can be routed to an agent. (Ex. *Payment page not functioning — “Unfortunately the payment page occasionally glitches on Internet Explorer. Please try again on a different browser (Firefox, Safari, or Chrome). Did that help?”*)

1. Ticket inquiry:

Possible resolutions:

Connect me with an agent

2. Ticket inquiry:

Possible resolutions:

Connect me with an agent

3. Ticket inquiry:

Possible resolutions:

Connect me with an agent

4. Ticket inquiry:

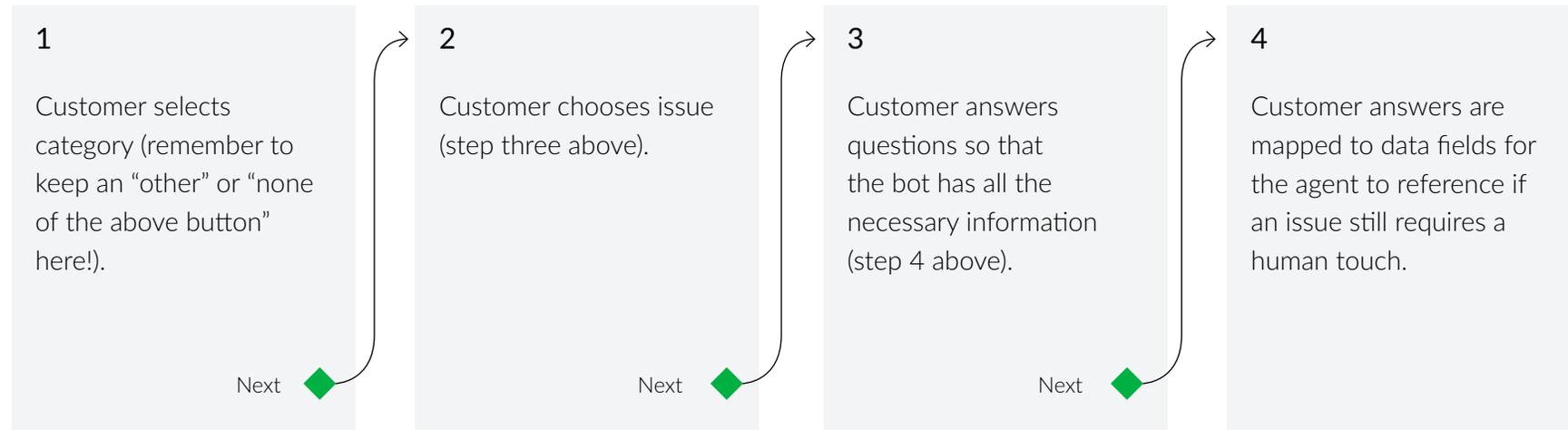
Possible resolutions:

Connect me with an agent

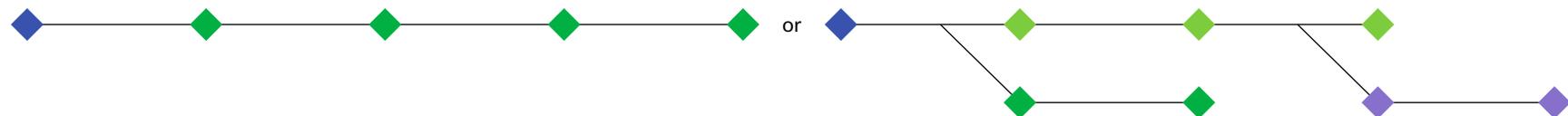
Time to Build Your Bot!

You've already put together each element of your branching flow. Now, it's time to put it all together.

Here's how your branching flow should look:



A bot flow can be as simple or complex as the issue demands!



A Deeper Dive into Using AI, Automation and Digital Channels Together

Many brands that are excelling with messaging are also driving more automation into their customer service processes using AI.

In addition to reaping the organizational benefits of automation, these brands are providing a great customer experience. It's no wonder [Gartner reports](#) that 68 percent of customer service leaders believe bots and virtual assistants will become even more important in the next two years.

The bottom line is that consumers demand to have their issues resolved quickly and efficiently. AI and bots enable intelligent interactions and personalized, one-to-one issue resolution.

"...AI-fueled digital customer service solutions complement and extend the capabilities of traditional customer service solutions to handle... new channels and orchestrate new experiences."

Forrester, *The Second Coming of Digital-First Customer Service Solutions*

Once your AI and bot capabilities are proving their value, you can take support to a new level by identifying all the ways to use them and the right role for your agents in the digital-first era.

One of the most innovative ways leading brands use bots is to fully automate customer service workflows that can directly integrate with third-party systems — and they are using Natural Language Processing (NLP) based classification at the beginning of the interaction. An NLP engine classifies the issue as being one that can be automated, and then tags the bot to carry out the process.

Brands across industries are automating end-to-end workflows for tickets related to topics like order returns, account recovery, account status, and delivery status, handled 100 percent by AI and bots.

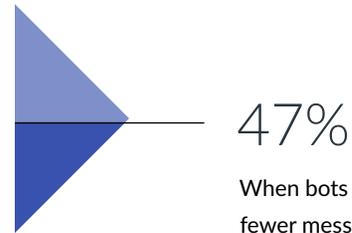
Internal-Facing People Improvements Delivered by AI and Bots

AI-powered bots dramatically improve the quality-of-life aspect of agents in several ways. First, they enable agents to continually improve their performance, minimizing agent frustration and yielding a more positive attitude. As the AI system learns more with each new customer interaction, it can better guide live agents. This promotes greater agent trust in bots while helping agents boost their own performance.

Second, AI frees supervisors to spend more time managing and helping their team improve instead of doing busywork like classifying issues and routing. Agents who receive more management attention can stay on track and improve more consistently.

Third, the power of combining messaging with automation (a result of AI) helps agents avoid excessive downtime or overwhelming backlog, and, as noted earlier, agents can use time-lapsed responses with messaging — so they can manage multiple issues simultaneously.

Finally, automation enables bots to collect much of the up-front information when customers launch inquiries. So, if and when an agent enters the conversation, the agent can resolve the issue in fewer interactions (and not waste time on rote and routine information collection).



When bots are used, agents are able to send **47 percent** fewer messages per conversation.

The Financial Impact of AI and Bots

It's easy to see how AI is reshaping customer service, as customers pleased with their support experiences spend more while support organizations gain efficiency and save costs.

According to IDC, "AI associated with CRM activities will boost global business revenue from the beginning of 2017 to the end of 2021 by \$1.1 trillion."



Here's how it's applicable specifically within the customer service space:

Customer Service AI & Bots Can:

- ◇ Automate handling routine queries
- ◇ Classify and route issues to the most qualified agent
- ◇ Spot trends and identify potential issues in your product or service
- ◇ Improve customer satisfaction
- ◇ Reduce operating costs
- ◇ Increase revenue

Source: IDF Report: The Economic Impact of AI

Prepare Your Team for Next-Generation Customer Service

The best customer service strategy will fail if you don't equip your agents to succeed. In addition to supplying them with the right technology and tools to get the job done, you need to get them ready for handling customer interactions featuring messaging and bots.

Socialize

- ◇ Through meetings, make your agents aware of your plans to evolve to next-generation customer service.
- ◇ Keep agents up to date on your plans and timeline for introducing messaging and bots through newsletters and other frequent communications.
- ◇ Create a forum – whether online or in person – so agents can get their questions answered about the changes.
- ◇ Don't forget – you need to make your customers aware of your self-service and messaging options too!

Equip

- ◇ Provide your agents with the technology and tools they'll need to handle customer interactions via messaging and bots.
- ◇ Develop in-depth and at-a-glance guidelines about handling customer service via messaging and bots that agents can refer to as needed.

Train

- ◇ Train your agents to deliver support side by side with messaging and bots.
- ◇ Guide agents on when to encourage self-service.
- ◇ Educate agents on new workflows and SLA expectations.
- ◇ Prime them to master the intricacies and nuances of delivering customer service via messaging.

Continuously monitor agent performance with messaging and bots to identify agents needing additional training.

This Isn't the Conclusion. It's the Beginning of Your Digital-First Customer Service Journey

By now it's clear that moving forward, brands will need to reach for higher and higher levels of digital communication and automation while maintaining a great customer experience in order to be considered a top performer in customer service.

That's why the contact center of the near future will look very different than it does today—with higher-skilled agents and a technology stack powered by advanced, intelligent automation.

In the face of this customer service sea change, your customer service organization needs to address three essential considerations to move forward:

1. Channel Unification: Regardless of the extent to which your company relies on automation, your first step should be directing customers toward self-service first. It is the only way to deliver acceptable levels of support without breaking the bank. That said, integrating self-service with messaging as a channel is a must since customers both expect it and have become accustomed to it. Of course, there will always be a need for a live agent, either by phone or chat. So, create your channels so that customers have the ability to escalate to live agents with a full record of their existing conversation.

- 2. User-Friendly Agent Dashboard:** Can you get a clear snapshot of your customer service operations across all channels at any point in time? Do you have visibility into robust performance analytics? Are your agents able to see priority issues and backlog in real-time? The quality of your agent dashboard is an important aspect of your customer service platform.
- 3. Frustration-Free Automation:** You may not need any level of automation right now. But if your customer base grows, at some point, you will likely need to end your sole reliance on human agents to keep pace with your competitors. With that in mind, make sure to evaluate the automation and self-service capabilities that a customer service platform offers.

Ready to move forward with digital-first customer service? [Request a demo](#) of Helpshift's intelligent and conversational customer service platform.

About Helpshift

Helpshift's next-generation digital customer service software enables B2C brands to scale their support while offering differentiated experiences through web, in-app, email, phone and messenger app channels. Helpshift's innovative asynchronous messaging model across these channels gives people back their time, keeps conversations in context and allows humans and automations to work together to solve problems faster. The Helpshift platform embeds knowledge and AI to let customer service organizations best utilize a mix of automated service, self-service and human-assisted service. Serving over 450 businesses worldwide, including Xfinity Home, Microsoft, Tencent and Supercell, Helpshift is headquartered in San Francisco, with offices around the globe.

To learn more about Helpshift, visit helpshift.com and follow @helpshift on Twitter.

