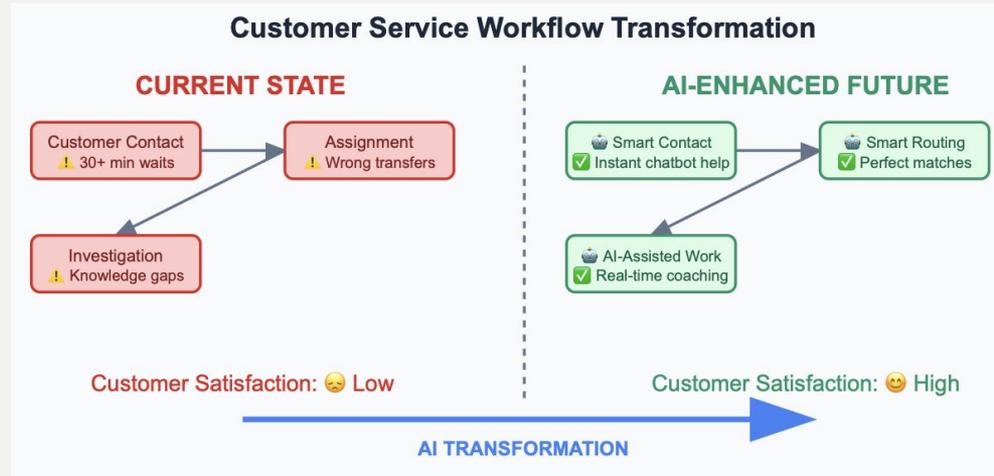tripleten

AI-Powered Customer Support Workflow

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Introduction

- The following customer service workflow moves inquiries from initial customer contact through manual logging, supervisor assignment, CSR acknowledgment/investigation/resolution (with escalation if needed), and finally customer satisfaction surveys.
- The goal of this presentation is to identify current inefficiencies and incorporate AI-driven solutions to reduce or completely solve said inefficiencies.

Customer Service Workflow Transformation

CURRENT STATE

Customer Contact
⚠️ 30+ min waits

Assignment
⚠️ Wrong transfers

Investigation
⚠️ Knowledge gaps

Customer Satisfaction: 😞 Low

AI-ENHANCED FUTURE

🤖 Smart Contact
✅ Instant chatbot help

🤖 Smart Routing
✅ Perfect matches

🤖 AI-Assisted Work
✅ Real-time coaching

Customer Satisfaction: 😊 High

AI TRANSFORMATION

Current Workflow Overview

Customer Service Flowchart

Legend

Standard Flow =
Conditional Flow =
Customer =
Customer Service Rep. =
Customer Service Rep. Decision =
Customer Relationship Manager =
Expert Level Support =

Step 1: Customer Inquiry/Issue

Customer Inquiry: Email

Customer Inquiry: Phone calls

Customer Inquiry: Website contact forms

Customer Inquiry: Social media platforms

Step 2: Manual Inquiry Logging

CSR
(Customer Service Representative)

CRS:
-Manual data log

Step 3: Review

CRM System
(Customer Relationship Management)

Supervisor:
-Inquiry review and assignment

Step 4: Acknowlegment/Investigation

CSR
(Customer Service Representative)
Assigned based on:
-Current Workload
-CSR Expertise
-Issue Type

CSR:
-Consult internal knowledge
-Collaborate with other departments (If necessary)

CSR:
-Send receipt of inquiry response/estimated resolution time

CSR:
IF unable to resolve inquiry
-Escalate

Conditional - Step 5a: Potential Escalation

Expert Level Support

Expert level support:
IF able to resolve inquiry
-Return resolution to CSR

Step 5: Inquiry Resolution

CSR
(Customer Service Representative)

CSR:
Communicate solution to customer

Step 6: Customer Satisfaction Survey

Customer

Key Problems Identified

1. **Problem 1: Inefficient Initial Contact and Queue Management - 22.4% of complaints**

   Where in the workflow: Step 1(Customer Inquiry) - Various channels including phone
   What the problem is: Multiple complaints indicate excessive wait times and poor queue management.

2. **Problem 2: Poor Assignment and Knowledge Management - 40.8% of complaints**

   Where in the workflow: Step 3(Review & Assignment) and Step 5(Investigation & Resolution)
   What the problem is: Tickets are being assigned to CSRs who lack proper expertise or access to necessary information.

3. **Problem 3: Inadequate Follow-through and Case Management - 36.7% of complaints**

   Where in the workflow: Step 4 (Acknowledgment) through Step 7 (Resolution/Survey)
   What the problem is: Promises made during acknowledgment aren't being fulfilled, and cases are being mismanaged.

Proposed AI integration

Suggested AI Tools
- **Intelligent chatbots** at Step 1 (Customer Contact) to handle routine inquiries like password resets and account questions before human involvement
- **Smart routing system** at Step 3 (Assignment) that automatically analyzes inquiry content and assigns tickets to the best-matched CSR based on expertise and workload
- **Real-time agent assistance** during Step 5 (Investigation) providing suggested responses, relevant knowledge base articles, and complete customer history
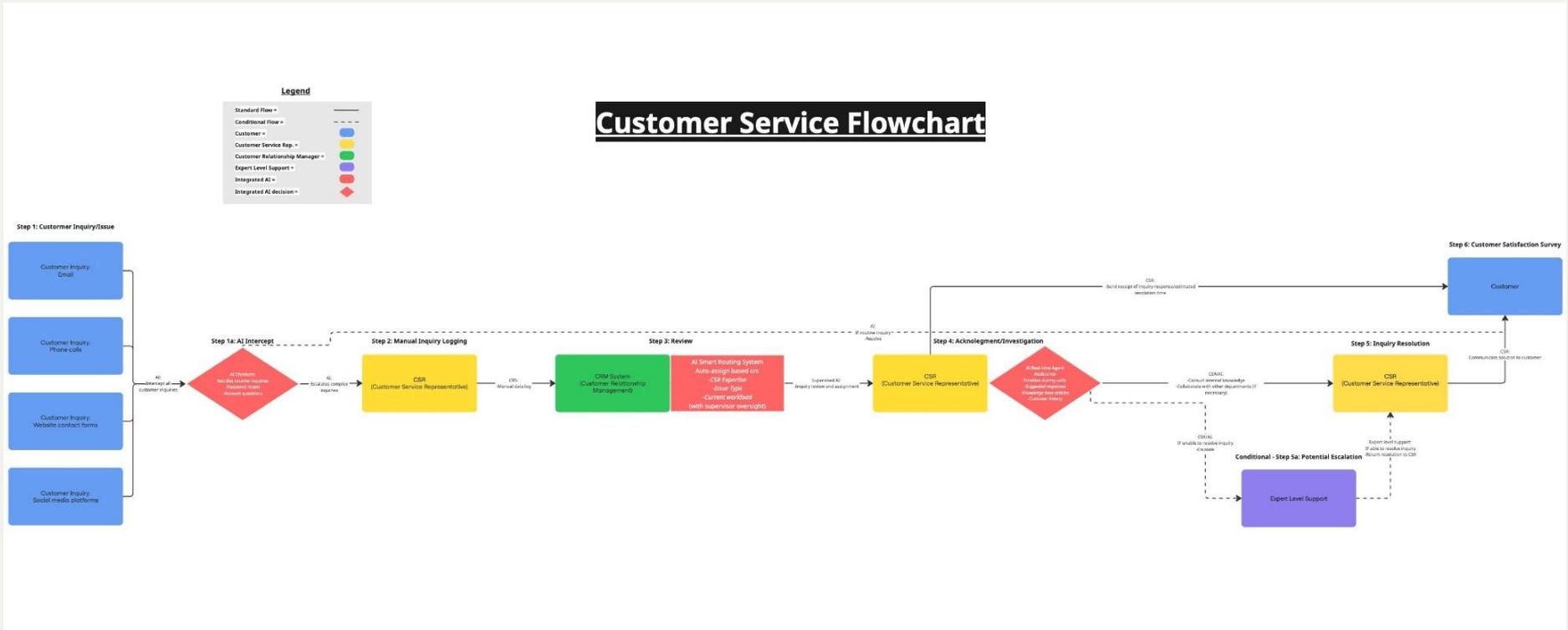
Expected benefits
- **Faster response times** with immediate answers for simple questions and more accurate first-time escalations to appropriate specialists
- **Drastic reduction in routine ticket volume** for human agents, allowing focus on complex problem-solving and relationship building
- **Improved consistency** through standardized responses and automatic promise tracking to prevent follow-up failures

Potential risks or limitations
- **Customer frustration** if AI systems fail to understand complex requests or force customers through lengthy automated processes
- **Implementation costs and training time** for staff to learn new systems while maintaining current service levels during transition
- **Over-dependence on technology** that could leave agents less capable of handling issues when AI systems experience downtime

Updated Workflow with AI

Legend

Standard Flow =	———
Conditional Flow =	- - -
Customer =	🟦
Customer Service Rep. =	🟨
Customer Relationship Manager =	🟩
Expert Level Support =	🟪
Integrated AI =	🟥
Integrated AI decision =	🔴

Customer Service Flowchart

Step 1: Customer Inquiry/Issue

- Customer Inquiry: Email
- Customer Inquiry: Phone calls
- Customer Inquiry: Website contact forms
- Customer Inquiry: Social media platforms

Step 1a: AI Intercept

AI Chatbots: Handles routine inquiries Password resets Account questions

AI: Intercept all customer inquiries

AI: Escalates complex inquiries

Step 2: Manual Inquiry Logging

CSR (Customer Service Representative)

CRS: Manual data log

Step 3: Review

CRM System (Customer Relationship Management)

AI Smart Routing System Auto-assign based on:
- *CSR Expertise*
- *Issue Type*
- *Current workload*
(with supervisor oversight)

Supervised AI: Inquiry review and assignment

Step 4: Acknowlegment/Investigation

CSR (Customer Service Representative)

AI: If routine inquiry -Resolve

AI Real-time Agent Assistance: Provides during calls -Suggested response -Knowledge base entries -Customer history

CSR/AI: -Consult internal knowledge -Collaborate with other departments (if necessary)

CSR/AI: If unable to resolve inquiry -Escalate

Conditional - Step 5a: Potential Escalation

Expert Level Support

Expert level support: If able to resolve inquiry Return resolution to CSR

Step 5: Inquiry Resolution

CSR (Customer Service Representative)

CSR: Send receipt of inquiry response/estimated resolution time

CSR: Communicate solution to customer

Step 6: Customer Satisfaction Survey

Customer

tripleten

Conclusion

This analysis demonstrates how targeted AI integration can systematically address workflow inefficiencies identified through customer feedback data by implementing three strategic solutions - intelligent chatbots for routine inquiries, smart routing for optimal assignment, and real-time agent assistance for knowledge enhancement. These solutions directly address the root causes of customer complaints (extended wait times, poor routing, inconsistent knowledge) while maintaining existing workflow structure. Implementation of the above suggested AI tools will increase efficiency for human agents while at the same time bringing about an overall reduction in routine ticket volume and enhanced first-call resolution rates, illustrating AI as a complementary tool that enhances human capabilities rather than replacing them.

Additional potential

Predictive Case Management & Follow-up

- **Automated promise tracking system** that monitors commitments made to customers and triggers alerts for follow-up actions
- **Predictive escalation** that identifies cases likely to require escalation before they become problematic
- **Intelligent scheduling and callback management** that automatically schedules and executes promised follow-ups
- **Proactive customer communication** that sends status updates at predetermined intervals

Smart Escalation and Collaboration

- **Context-aware escalation system** that automatically packages all relevant customer information, conversation history, and attempted solutions when transferring cases
- **Department prediction algorithm** that ensures cases are routed to the correct specialized teams on first transfer
- **Collaborative AI workspace** that allows multiple departments to work on cases simultaneously with shared context