

Cut the long wait times:

An 11-step guide to boost customer service with AI-powered automation



Table of Contents

CHAPTER ONE

**Embrace an AI-first omnichannel solution
to transform your customer support**

01

CHAPTER TWO

**Transform customer interactions with
AI-backed self-service automation**

03

CHAPTER THREE

**Empower your agents with an AI-powered
omnichannel customer support solution**

07

CHAPTER FOUR

**Streamline operations with AI-driven
process automation**

11

CHAPTER FIVE

**Monitoring and elevating AI-driven
customer support insights**

14

**Redefine customer service excellence
with generative AI**

17

Appendix

17

CHAPTER ONE

Embrace an AI-first omnichannel solution to transform your customer support

According to [Finances Online](#), 91% of customers who receive poor customer service leave without warning, and 47% of them switch brands.

Swift support and seamless experiences are critical to keeping your customers happy, making customer support a vital component of any business.

While it's easy to turn to agents to resolve customer queries efficiently, the hard truths are:

31.87%

of customer support managers in B2B agreed in a survey that 24/7 support is the top expectation of customers from service teams.

35.14%

say that easy access to support is most important in defining a great customer experience.

35.71%

say that work overload is the most common reason for agent attrition.

Source: [Freshdesk Customer Service Benchmark Report 2023](#)

AI-led automation steps in as a solution to these challenges. The most talked-about tech advancement in the AI boom—generative AI—marks a pivotal moment in technology and customer service. Its power and impact are too significant to miss. With AI-first omnichannel experiences, customer service leaders can revolutionize how customer support is delivered.

In this guide, we delve into how you can solve critical business challenges and elevate customer service by: automating self-service, arming agents and admins with generative AI tools to be more efficient, and surfacing AI-driven insights to make data-backed decisions.

CHAPTER TWO

Transform customer interactions with AI-backed self-service automation

Step 1: Use AI-powered chatbots to manage high support volume

Customer support teams often receive a high volume of simple but repetitive queries such as “Where is my order?” or “I want to place a return request.” While these queries are important and require prompt responses, they also steal a significant amount of time from your support agents. As queries mount, the high case volumes can cause frequent backlogs, forcing agents to play catch-up.

Relieve the pressure on agents by addressing many common queries using AI-powered chatbots that help with better language understanding, intent detection, and sentiment detection—enabling your customers to help themselves while empowering your agents to take on more complex issues.

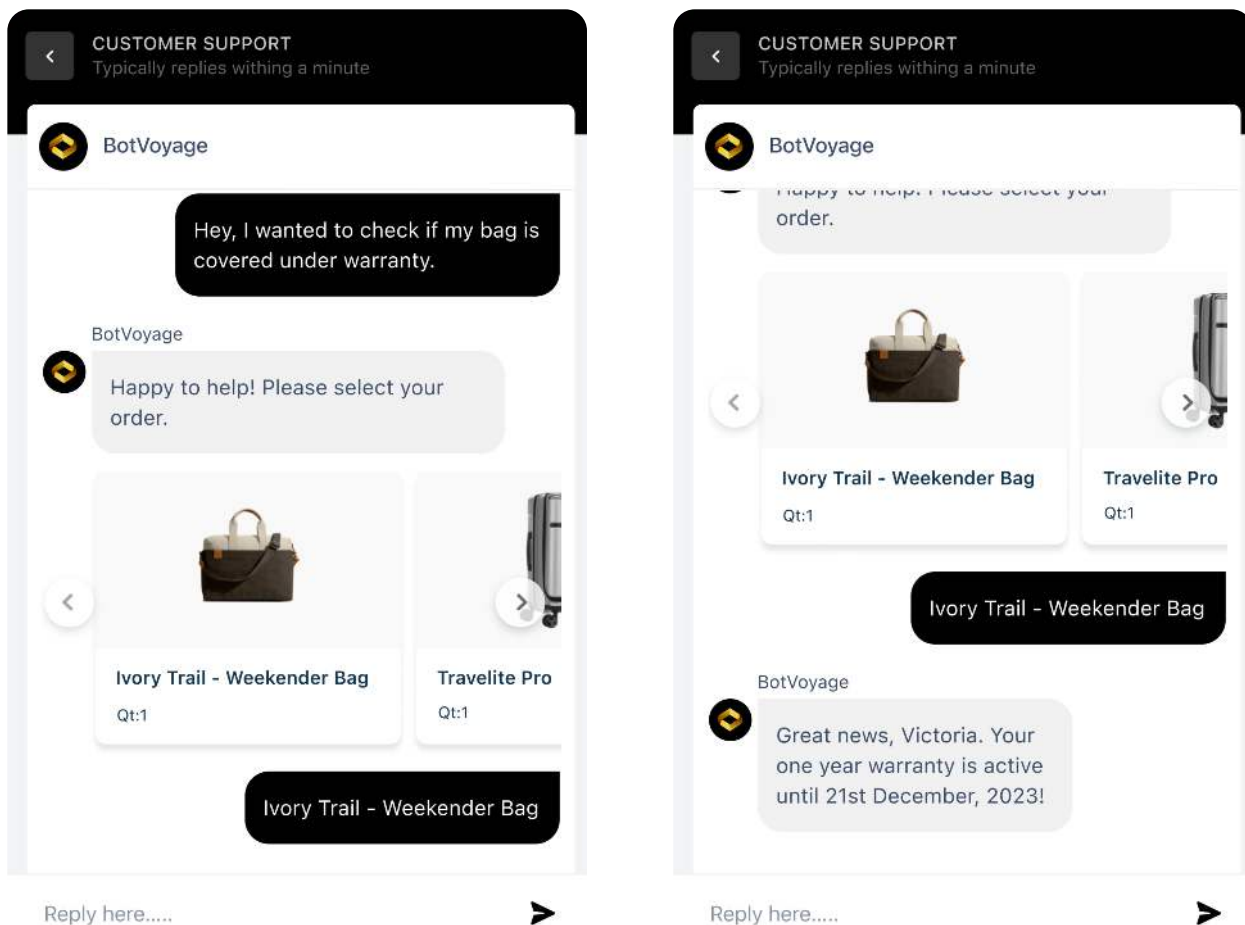
59%

of businesses have ensured a workflow that routes basic queries to bots efficiently to free up agents' time to handle more complex queries.

Source: Forrester survey*

Power your support by making it easy for customers to reach out to you on channels of their choice. By automating self-service with AI-powered chatbots, you can speed up responses for repetitive queries and significantly free up your agents' time. With chatbots, you can deflect up to [70%](#) of conversations, allowing your team to focus on more complex queries. The result? Improved support metrics like CSAT, NPS, etc.





Example of automated self-service using chatbots

Step 2: Design conversational experiences and automate personalized interactions

Even though chatbots can help you handle a high volume of support queries, customers still expect contextual conversations, not generic bot replies.

AI-powered chatbots can understand natural language queries from your customers and can be trained to deliver personalized solutions. To provide a personalized support experience on chat, we recommend training your AI on various data models.

For instance, Freshworks' native AI engine, Freddy AI, is trained on different types of data models, ranging from generic to account-specific customer service use cases. Freddy AI-powered chatbots can respond to customer queries based on their context, profile, and history of interactions, resulting in high-quality conversations.

Step 3: Create self-service solutions with an AI-driven knowledge base and FAQs

AI can simplify the process of creating knowledge base articles and FAQs. With just a few prompts, generative AI can help agents create comprehensive articles without spending time on extensive writing, copy editing, and formatting. By eliminating the need to create articles from scratch, agents are empowered to prioritize high-value customer engagements.

67%

Time savings for agents who used generative AI prompts to create knowledge base articles

Source: Freshworks' [generative AI beta program](#)



CHAPTER THREE

Empower your agents with an AI-powered omnichannel customer support solution

Step 4: Implement automated ticket management to boost agent efficiency

A crucial part of automating self-service is identifying when a customer needs agent support and routing the query at the right time. Delays and errors in assigning cases to the right agents can negatively impact the customer experience (CX).

53%

of respondents have built and leveraged AI-driven predictive capabilities to enable an efficient routing system for responses to chat inquiries instead of relying on a rules-based routing system.

Source: Forrester survey*

When a customer needs to talk to an agent, you can auto-route the queries to the agents who can best resolve them. AI can further streamline this process by analyzing each incoming query, auto-classifying it based on your team's predefined filters, and routing the conversation to the right agent. This prevents tickets from remaining unassigned for long durations. It also prevents cases from being assigned to multiple agents, which might result in redundant work.

AI-backed customer support can analyze customer data and interaction history to evaluate the intention of the query. This AI-led action can help prioritize high-intent and critical queries so agents can reach out to those customers swiftly and proactively.

Step 5: Context is everything—provide a unified agent workspace

When paired with the right customer service software, agents are truly enabled to deliver exceptional support that boosts customer satisfaction. Customer service solutions, such as Freshworks, provide seamless experiences across channels, from automated self-service to agent-led conversational support, plus advanced ticketing management for issues.

A customer service suite centralizes queries from various conversation and ticketing channels—email, live chat, WhatsApp, SMS, iMessage, and social media—into a unified platform. This empowers agents to manage conversations and tickets within a single workspace, irrespective of channel. The required context appears on one screen, equipping agents with the necessary information to have meaningful conversations with customers without switching between multiple applications.

54%

of businesses agree their agents have benefited from a simplified workday from the 360-degree view of all customer conversations and full customer context.

Source: Forrester survey*

Step 6: Equip agents to provide high-quality, prompt responses with generative AI

Help agents be more productive by enabling them to work hand-in-hand with AI. For instance, Freshworks' Freddy AI, powered by generative AI, can help agents respond with quick, consistent, empathetic replies by:

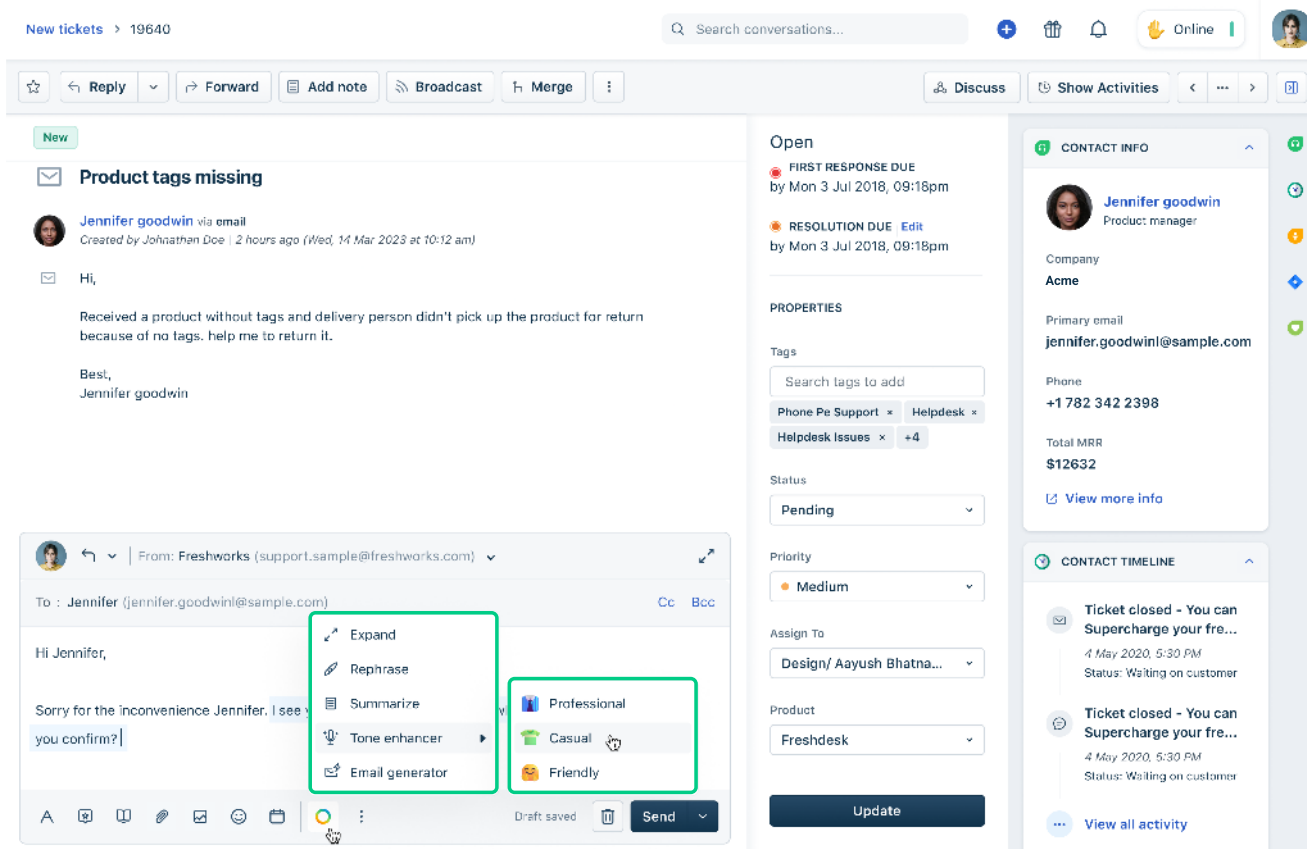
- Prompting follow-ups with customers: AI can prompt customers to reply with automated follow-up messages in case they are slow to respond, helping agents close queries faster.
- Auto-resolving simple queries: AI helps close tickets and conversations based on specific keywords such as "Thank you," marking the end of the conversation. For example, agents using this feature during the Freshworks beta release had a [27%](#) reduction in manual tasks, helping them close tickets faster.

- Improving the tone of replies: Generative AI can empower agents to deliver support that is both effective and efficient by enhancing the clarity and impact of their communication with customers. Agents can quickly type out a reply and AI will replace informal language with more formal alternatives that match the brand voice, providing a clear response to customers.

50%

Time savings for agents who utilized AI to rephrase feature to serve their customers more quickly

Source: Freshworks' [generative AI beta program](#)



Example of AI-powered Tone enhancer

CHAPTER FOUR

Streamline operations with AI-driven process automation

Step 7: Facilitate seamless internal and cross-functional collaboration

An efficient customer service tool helps speed up and deliver accurate responses by empowering agents to collaborate with various subject-matter experts. By bringing multiple teams—support, sales, marketing, etc.—into one platform, you can:

- Consolidate data into one system
- Break internal silos
- Keep all stakeholders accountable
- Swarm to solve for the customer quickly and efficiently

Generative AI can automatically create a summary of the support conversations, saving agents the time and effort of reading through an entire conversation or email chain. This also accelerates cross-team collaborations. Instead of relying on agents to bring collaborators up to speed, a quick summary provides a clear understanding of the entire context and the next steps.

57%

Time savings for agents using the conversation summarization function

Source: Freshworks' [generative AI beta program](#)

The screenshot displays the Freshworks support interface. On the left, a ticket titled "Request for Return of Product Without Tags" is shown. A "Ticket summary" box highlights the key points: a customer received a black and white polka dots T-shirt on 10th March, received the product without tags, and wants to know the return procedure. Below the summary, an email from Jennifer Goodwin is visible, detailing her request for a return label. The right sidebar contains "CONTACT INFO" for Jennifer Goodwin, "PROPERTIES" with tags and status, and a "CONTACT TIMELINE" showing previous ticket interactions.

Example of AI-powered conversation summarizer

Step 8: Coach your agents on the job with AI

AI can be a crucial component in improving the quality of support delivered. It analyzes support conversations, performs in-depth reviews, and provides valuable feedback on the quality of support delivered. Here's how AI can empower agents to boost customer experience with each interaction:

- **Recommendations for next steps:** AI can analyze the customers' purchase and support history and suggest the next best actions agents can take to resolve the queries effectively.
- **Guidance for continuous improvement:** AI can offer real-time guidance to agents during and after every customer interaction. For instance, Freshworks' Freddy AI can automatically conduct thorough evaluations of each customer conversation and provide valuable insights to your team. Agents can swiftly gain insight into their quality of service. By tracking progress and recognizing areas of improvement, agents can learn to provide better customer experiences with each interaction. This detailed report also offers metrics for admins to monitor and tailor targeted training programs that enhance agent performance.

Step 9: Allow your admins to easily set up workflows and processes

In addition to identifying and recommending key areas of optimizing customer support, AI can also help execute the next best action. With generative AI, you can work faster by simply typing out your requests as prompts. Based on these prompts, AI can automatically perform various actions on your behalf—from building chatbots for various platforms to setting up automation and workflows. This reduces time-consuming manual work while building, deploying, and testing new processes that improve operational efficiency.

The best part? You can easily accomplish all these tasks by conversing with the AI using natural language.

CHAPTER FIVE

Monitoring and elevating AI-driven customer support insights

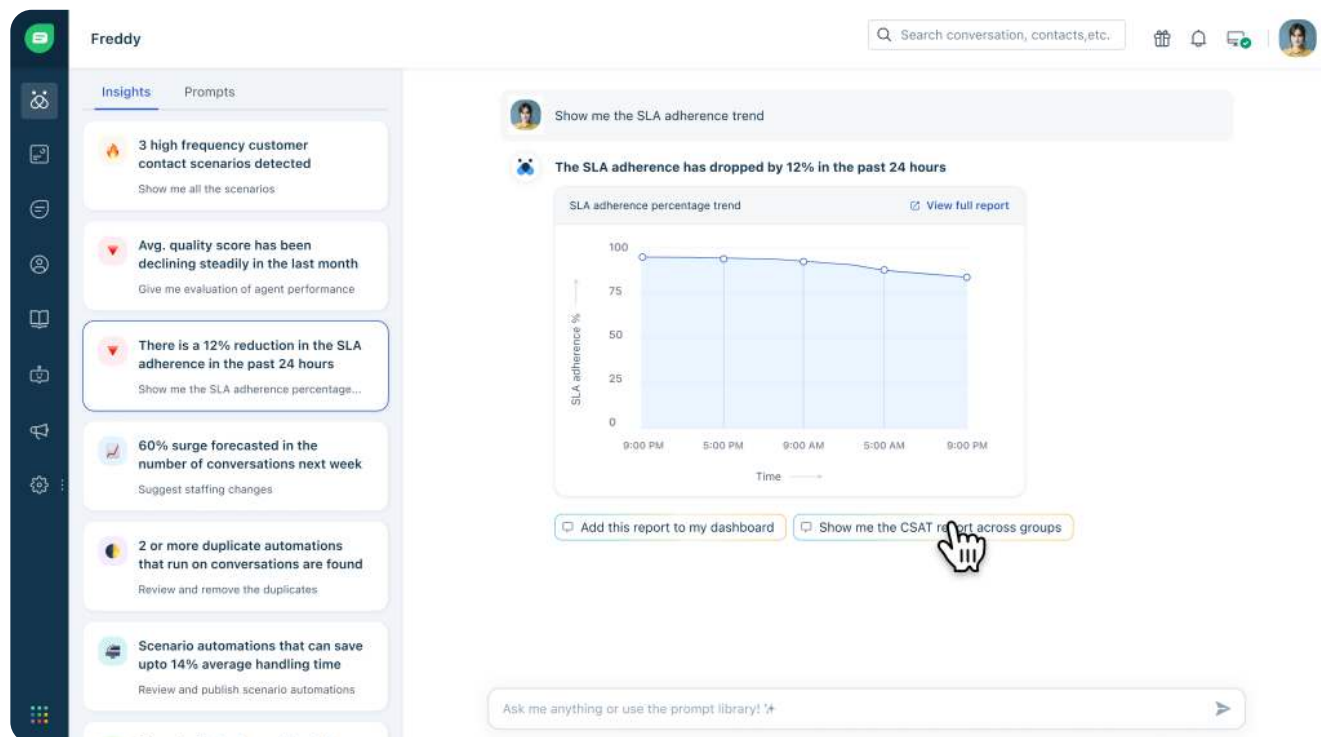
Step 10: Track team and operational efficiency with data-backed performance insights

When businesses leverage data-driven insights, they can automate easy-to-answer questions, empower agents to respond to harder queries, and streamline business processes. However, this process can be time-consuming, especially when relying on an analytics team to collect and analyze data before generating useful insights.

AI reduces the need to create and navigate complicated reports to identify areas for improvement. It can continuously analyze your performance data, identify important insights that require your attention, and suggest optimizations to enhance performance. This could look like:

Customer service data	AI-powered insights
Chatbot performance showing how many questions are passed to agents	Surfaces chatbot flow suggestions to identify conversation gaps, deflect frequent queries, and reduce agent dependency
Detailed analysis of agent performance and how quickly agents meet first response and resolution SLAs	Arms agents with the next best steps and guidance during and after every customer interaction to engage quickly and effectively
The volume of queries coming in at different hours of the day	Identifies patterns and provides suggestions to make data-backed decisions

A comprehensive customer service solution with unified data management and reporting capabilities enables leaders to access data easily. Leaders can create and navigate complex reports, identify areas for improvement, and get key insights and recommendations surfaced automatically, facilitating data-driven decisions.



Example of how you could interact with AI-generated insights

Step 11: Eliminate complex integrations

Integrating a standalone AI solution alongside your support software can require extra effort to integrate seamlessly with your existing tech stack. Furthermore, managing multiple software programs means additional expenses.

AI innovations also prioritize security, ensuring that the data is never shared with external parties, protecting your privacy and confidentiality. An out-of-the-box AI solution can make it easy to configure and maintain without compromising functionality.



Redefine customer service excellence with generative AI

Modern businesses thrive on customer satisfaction, creating a constant need to boost agent productivity and optimize operations. Generative AI revolutionizes self-service, boosts agent productivity, and helps create efficient business processes. It's a solution that goes beyond routine tasks, empowering your team to provide a smoother and more satisfying customer experience.

The right tech partner can help bring all of these benefits to life. With Freshworks Customer Service Suite, you can improve agent productivity with a unified omnichannel solution for self-service, conversational support, and ticketing.

[Book a free demo](#)

Appendix

*Forrester survey: "Freshchat Thought Leadership Program—Conversational Engagement Maturity," Forrester Research Inc., January 2023



freshworks.com