

How to use automation to give more personal customer support



Yep, we said it: automation and AI will actually let you be more personal with customers—not sound like a robot. Here we'll cover the basics of support automation, its limitations, and examples of how you can use it today.

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We're no stranger to automation if you think about it. From ordering groceries online to booking tickets to that must see concert, you can use automation just about everywhere. Automation in customer service is no exception.

As our tech savvy world continues to evolve with no sign of slowing down, speed and efficiency are no longer a luxury. We expect it. And the business world has automation to thank for lending a helping hand in delivering exactly that to customers. In fact, experts

predict 85% of all customer interactions will be handled without a human agent by 2020.

Yet many people still think automation is bound to replace human interaction. In reality, automation doesn't mean all hope for human connection is lost and customer support agents will be replaced by robots one by one (we're still a long ways from that). In fact, quite the opposite when used correctly.



CHAPTER 1:

A summary of automation and AI

First things first. What is automation? What is AI? What's the difference?

Automation and Artificial Intelligence (AI) have a lot in common:

- They both start with "A."
- They both make use of technology, like "robots."
- They both work mostly without the interaction of humans.
- They both are used to make the customer experience better.

But beyond those things, the two are actually very different. AI is a technology designed to mimic human communication and thought processes. In contrast, automation is a set of instructions that help a product follow a predefined behavior pattern.

In the context of your support organization, the team may use automation and AI for similar roles—after all, they can both take some of the weight off of your human support reps' backs. But the work you'll do with AI should be reasonably different from the tasks you create using automation.

“AI should learn and improve over time as it receives more input.”

What is AI?

Artificial Intelligence (AI) is everywhere these days. In 2016, venture capital firms invested \$5 billion, in 658 companies, in AI technology. The biggest companies in the world (Alphabet, Apple and Amazon) are all investing in and acquiring AI technology. So what actually qualifies as Artificial Intelligence?

AI is the ability of machines to display human-like intelligence, where intelligence is defined as learning from past experience, recognizing trends, or displaying reason.

Artificial intelligence is not a bot that regurgitates links to help center articles. Many chatbots simply use hard coded rules and "if/then" statements to provide answers. This isn't true intelligence. AI should learn and improve over time as it receives more input.

Here's some example of AI that you might have already run into:

- Google trained a computer to recognize cats in photographs
- IBM's Watson defeated two Jeopardy champions
- Snapchat recognizes faces from other objects in order to add filters

Why use automation and AI?

To save time. At Front we work with many businesses who rely on complex automation specifically relating to their communications: emails, live chat, SMS texts, etc. On average, Front users benefit from automation 347 times a week, giving them back 1.5 hours of their time.

But the real kicker is not that time gained back but what you can do with it. Having a little more time in your day allows you to pause and have more thoughtful interactions. You can spend it on having a delightful conversation with a customer you might have normally rushed through. You can take an extra 30 seconds to write out a personalized email. Or you can invest time into building more automation that will save you even more time and get stuck in an endless loop...

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Finding success with implementing automation and AI

It might feel overwhelming to be at the forefront of the next big change in customer service future. 15 years ago we were learning how to deal with email and live chat. 5 years ago, everything changed again with social customer care. Artificial Intelligence is the new era and customer service future.

To be successful in the AI assisted customer service future, there are three things you should focus on:

- **Change Management** – those who can adapt, will win. Change is the only constant in business, and people who can keep up will be better positioned to

take advantage of new opportunities. Those who can't will be left behind.

- **Process Management** – AI needs processes to follow. Integrations depend on clear and defined processes to be successful. Many of the opportunities created in the era of AI will involve reading and updating processes to make the customer experience better.
- **Always be Learning** – employees who continue improving have always been the most successful. As we get older, it gets easier to say "oh, I don't understand that" and move along. Instead, assume you can learn anything, and dig in. The more you know, the more successful you will be.

CHAPTER 2:

Understanding the limits of automation and AI

There are a few pitfalls of AI and automation in customer service to be aware of, so you can avoid falling into the trap when you're rolling these initiatives out.

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Not tempering your expectations

Artificial intelligence and its use in the business world have been hyped for such a long time now that many people have become completely caught up in it, expecting every kind of AI automation to be this silver bullet that will get rid of all their problems and turn their company into a Fortune 500 member.

When we are talking AI automation in customer service, there are a few ways in which unrealistic expectations can result in total disappointment.

For one, some adopters expect the simplest of AI models to be this sci-fi thingamajigs where a sentient robot handles every customer inquiry as well (or better) than a human customer service agent can. This is simply not the case. We are still a long way from AI customer service that will be able to handle conversations with the same responsiveness and agility that humans have.

More realistically, some people get disappointed that AI automation does not bring the return on investment that they expected going in. Once again, they expect far too much from something that can improve their customer service, but which is not this absolutely revolutionary thing that it is sometimes hyped for. Temper your expectations. AI automation is best used as an additional layer to your customer service strategy.

Going huge straight away

There is some sense in trying to go all in and attempt this overarching, comprehensive AI automation strategy for customer service straight away, setting up multi-channel coverage, piping it straight into your CRM software (probably with another layer of AI capabilities), assembling an entire (superbly expensive) data and AI training team and so on.

“AI solutions, even those that are sold out of the box, need to be maintained continuously.”

In reality, however, for most companies (including the not-so-small ones), taking it step by step is usually the best course of action. Trying on a quality chatbot, setting it up and then moving on from there is a much better solution.

By taking things slowly, you are reducing your initial investment, meaning that if your new customer service ally doesn't work out, you are not wasting too much money. Also, it is much easier to tinker with and modify a smaller system and try out new things. This will also make an analysis of the ROI much easier.

Taking humans out of the equation

The next trap is something we hinted at when we talked about the unrealistic expectations that some people have of AI when used in customer service. Namely, due to certain misconceptions they might have of AI, they believe that they can put all of their customer service into the hands of an AI.

This simply does not work. Even the most advanced AI models used in customer service are still very limited and they are capable of only very limited improvisation when conversing with customers.

For instance, a well-trained AI model will be able to recognize questions that resemble those that you would find on a FAQ page and serve an answer or initiate a Q&A sequence where the customer will get an answer after few more steps.

However, expecting an AI model to handle specific unique requests and solve complex problems that your customers might experience is simply unrealistic. However, what you can do is to set up your automated AI customer service system to recognize such situations and guide the customer to the right human customer service agent who will then be able to solve that issue.

In essence, you will want to let your AI handle more basic customer service requests and free up your people to handle the more complicated ones. The end result is that every customer will be provided with information and solutions quicker.

Setting it up and leaving it

Another trap that plenty of organizations fall into when adopting AI automation for customer service is that they see it as this out-of-the-box solution which they just set

up and leave running without ever coming back to it and modifying it.

Anyone who knows the first thing about AI can tell you that this is not the way AI is to be used. AI solutions, even those that are sold out of the box, need to be maintained continuously. Of course, at first, you will be spending huge amounts of time training.

Later, you will not be spending as much time with them, but you will still need to stay involved and analyze their performance.

For example, you might find out that your customers are using certain expressions and semantic constructions that you didn't foresee and that you need to modify your model so as to better answer such inquiries. Or, you might discover that your customers have troubles understanding what is asked of them at a certain step in the conversation and you will need to modify your model.

Of course, we must not forget about one of the most harmful things for any AI model and its application – bad data.

Besides the standard problem of bad data inputs which are common for any system that operates with large data sets, AI introduces the so-called concept drift where data is changed as the result of being used by an AI model.

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What does automation look like in support?

Automation is at the heart of many support strategies. There are likely many things that your team does every day that qualify as automation—like automated responses, for instance.

Automation keeps many support teams running on time and is a critical component of most any help desk software that you look into. Here are a few ways that automation shows up in support:

Autoresponders

Any team worth its salt has an autoresponder that it sends to customers explaining the support process while they are waiting for a response. Autoresponders are a great example of automation rather than AI. However, supplementing this process with some additional AI functionality can improve autoresponders even more.

Ticket assignment

Using functionality within your help desk, you can look for specific keywords or determine where customers submitted a ticket in order to assign it to the appropriate user. For instance, if you see a ticket come through with “bill,” “change plan,” or “credit card” in it, you may automatically assign it to your billing team.

Tag application

You can automatically apply specific tags used in reporting to a ticket based on its contents, like the automation above. For instance, you could set up a rule that any conversation with the word “checklist,” “check list,” or “list items” has the tag “checklist” assigned to it.

Escalation

Using a combination of ticket assignment and tag application, you can escalate tickets that have gone past a specific timeframe or need engineering action.

Email campaigns

Some companies, like HeadSpace, send out automated emails based on actions customers take within their product. You can use automation to detect the movements

that a user takes in the product and then trigger helpful email campaigns to push them along in their customer journey.

Ask how you did

Asking your customers for feedback is one of the surest ways to get meaningful, honest information about how your product is doing. You don’t want a team member to have to send out these surveys manually, do you? This is one of those times that automation is just the built-in way of doing things.

In-app onboarding

Approximately 83% of online buyers require some support to navigate the online buying process. Using automation, you can service many users while not placing any extra burden on your support team. Set up triggered automation to show in your product when, for example, someone spends longer than one minute on your pricing page without taking action.

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CHAPTER 4:

Examples of AI in customer support

While it’s certainly less prevalent than automation, AI is becoming a rising star on many support teams. Historically, AI required a lot of customized implementation, but now most software integrations make it easy to plug-and-play: it works right out of the box. Here are some ways that support teams make use of artificial intelligence in their support strategy.

“AI responds to your customers like a human would and can escalate to your support team as needed.”

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Chat responses

For many customers, live chat is the preferred method of reaching out to a company. In fact, 79% of customers say they prefer live chat purely because of the immediacy it offers compared to other channels—the average response time is around 2 minutes! To keep up with that level of speed and attention, companies could just staff tons of chat support staff... or they can implement AI. AI responds to your customers like a human would and can escalate to your support team as needed.

Personalized recommendations in autoresponders

Most companies already have autoresponders and macros that they have set up to send to customers within specific contexts. AI can improve on that even more. Using an AI service like Solvvy can generate a slew of custom responses and autoresponders that your team can use at the click of a button.

Better tagging and reporting

Using machine learning, tools like Idiomatic are making data sorting much easier for support teams. As we all know, human beings are fallible. That’s why automated tags, like we mentioned above, are so super. Machine learning software takes all of the errors out of your data and reporting and keeps things clean.

Social media responses

Like chat, social media is such a preferred platform because it enables customers to get responses fast. If you don’t have enough staff to operate your social media and offer the level of response time that your customers need and deserve, AI is there to help.

Better phone support

Anyone who has ever called a support phone line and gotten caught in an interactive voice system loop knows how terrible this experience can be. Luckily, many modern AI tools are creating smart software (like Alexa and Google Home) that use advanced voice recognition and language processing. AI can make phone support significantly better for your customers and team while also cutting down some associated costs.

Educate your team

AI like Guru Suggest can “listen in” on your team’s conversations with customers and work to supplement knowledge in context. That means that your support and sales team members can skip the process of searching for the answer by having it presented right at their fingertips like magic. Not only does it work for internal knowledge, though, AI can also surface important customer context. Let your support team focus on supporting your customers instead of searching for answers.

Understand customer sentiment

Just like asking your customers for feedback can uncover great information about what you could be doing better, mining your customer’s posts and comments for sentiment can be an even more bottomless treasure trove. Use a specialized tool for customer sentiment analysis, and you set your whole company up to learn some excellent insights.

Automating support without losing authenticity

Customers expect a helpful response from your team as quickly as possible. Under this pressure, even the best support teams can be tempted to compromise high-touch, detailed support for a quick and easy answer. Resorting to robotic, impersonal auto-responses can help stem the tide of support requests but often leaves your customers feeling dissatisfied — just what you were trying to avoid in the first place.

The good news is you can automate for efficiency without losing authenticity. Here's how.

1. Automate everything behind the scenes

There's no fooling your customers. They can tell when your support messages are completely automated, and they get frustrated feeling like they're talking to a brick wall.

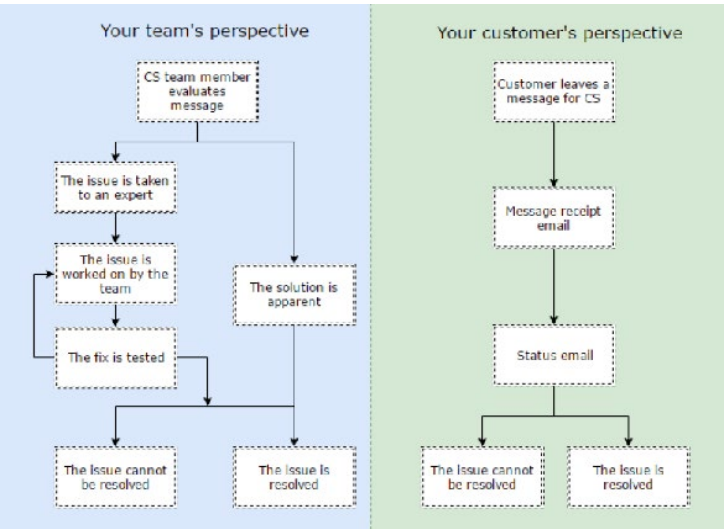
Even if the automated message is helpful—which they're often not—customers who have gone through the effort to reach out to you deserve a thoughtful response.

Great customer support is equal parts hearing customer problems and solving customer problems. Three things have to go right internally for a customer to get a helpful reply to their question:

- 1. **Workflow management.** The right support person has to find and open the message.
- 2. **Research.** That person has to gather the relevant context for a response or hand it off to someone who can.
- 3. **Communication.** He or she needs to draft a thoughtful, personal response to get additional necessary information or address the problem.

2. Make your workflow work for you

A customer problem can take five minutes to solve or five weeks. And while the magnitude of the problem might be clear from where you're standing, that doesn't mean it's clear to your customer:



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Your team might be laboring away on the fix while the customer is getting fed up with the wait and starting to reconsider your product. To keep everyone happy, you may have to check in repeatedly about the problem and continuously update the customer— all while managing the countless other messages flooding your inbox.

3. Gather the context you need automatically

The more context you have for a message, the better equipped you are to answer. Personally-tailored responses rely on knowing who the customer is, what their relationship with your brand is, and what kind of problems they've had in the past.

If you're running support out of a regular inbox, you have to do a lot of digging to gather that context. Reading through archived emails, searching support documentation, and hunting down LinkedIn profiles and social media accounts — for every single customer — takes too much time.

Instead, pick tools that gather all the relevant context in one place. You want to have access to:

- **Customer profile.** You want to know details about your customer's company, role, online accounts, and any past correspondence your team has had with the customer. You might have this in your company database and could connect this through a custom plugin, or you can leverage Front's integration with FullContact to pull in this third party data.
- **Conversation history and past issues.** If this is a recurring issue, there might be a bigger underlying problem that's worth addressing. Keep track to make sure you're not offering short-term workarounds for something that should be a growing concern.
- **Support articles and resources.** Keep your customer knowledge base close to your email inbox, so you can quickly furnish support responses with more detailed answers and related links. Front's integrations with knowledge base tools like Forumbee and HelpDocs allows you to find support resources directly in your inbox.

Time spent digging for information that's siloed away in one place or another is wasted time that could be spent helping your customers. Luckily, there are many tools that put the information you need to respond personally and efficiently right at your fingertips.

4. Use email templates as a starting point

The longer you work on a support team, the more you start to see the same questions crop up time and time again. Your first instinct might be to create a message template for the most common questions, but doing so only results in generic, catch-all emails.

For example, when we asked JetBlue how much it costs to change flights, they answered with this automated message:

Hello Paige,

Thanks for contacting JetBlue.

Each of our fare options – Blue, Blue Plus, and Blue Flex – offer unique, simple, and valuable features tailored to your personal preference. Please visit jetblue.com/fares to read more about our fares. Also, feel free to visit <http://bit.ly/JBExperience> for information about our award-winning flight experience.

We hope you have a great day and that all of your skies are JetBlue!

Kind regards,

Emily T.
JetBlue | Customer Commitment
Crewmember 37952

“The more context you have for a message, the better equipped you are to answer.”

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The email never answers the specific question, and — even worse — it sends the customer digging through their support docs to figure out the answer to an easy question. It definitely doesn't establish a relationship with the person on the other end.

Compare that with Spirit Airline's response to the same question:



DJ (Spirit Airlines Support)
Jul 12, 9:40 AM EDT

Hi Paige,

Thanks for bringing this concern to our attention.

If you are going to book a flight and may change it later, there is a modification charge of \$90.00 on the website and \$100.00 over the phone through our Reservations team. If you want to change your flight, you have to settle the modification charge plus any applicable fare difference.

Here's the link with additional information on how to change or cancel a reservation:

<https://customersupport.spirit.com/hc/en-us/articles/202097076-How-can-I-change-or-cancel-my-reservation>

We appreciate you contacting the Spirit Support team. Have a great day!

Best,

DJ
Spirit Support

There is clearly a real support rep behind this response (even if it might have some help from automation too). The rep tells us exactly how much it costs to change our specific flight and attaches a specific article from Spirit's knowledge base showing us how to do it.

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Sending dozens of these personalized emails might seem like a massive time investment, but you can still write a personal email without starting from scratch every time. All you need is a skeleton of an email, not a transcript. Here's a template JetBlue could have used instead to make their response fare a little better compared to Spirit's:

Hello {{recipient.first_name}},

Thanks for reaching out. I'm sorry that you were having trouble finding the price for [their specific question]— we know how frustrating it can be.

Cancellations and changes are different for each fare. It will cost you about [price here], because [reason here]. You can find more information these types of charges here: jetblue.com/travel/our-fares/. Does that answer your question?

Otherwise, happy flying!

Best, {{user.name}}

Airline support teams can easily make templates like these for their most common issues— pricing questions, in-flight food complaints, service questions, etc. Instead of constantly re-writing the same message, they'd be able to choose a template, and spruce it up with a personal touch. The same method applies to the most common questions about your product or business. Invest a bit of time up front creating response templates, so your support team can fire off quick, personalized responses and even update the templates with their favorite modifications over time.

5. Remember: You can't hack relationships

Your goal is not simply to respond to your customers but to build a great relationship with them. Automation can either help or hinder you from getting started on the right foot.

Only use automation for the behind-the-scenes work— like streamlining your internal workflow, gathering customer information, and setting up email templates— and never in place of real customer communication. You can't replace human authenticity with robots just yet.

If you properly leverage automation internally, however, you can spend your time crafting smart, friendly, empathetic messages to your customers to start and build a great relationship with them. You'll decrease your response time and increase the quality of your support emails.

CHAPTER 6:

Choosing AI-powered customer service solutions

Many existing companies offering AI solutions can be setup with minimal (or no) engineering resources and integrate into your existing CRM and help desk. Here are five different solutions that all offer something slightly unique depending on your needs.

- **TrueAI** – “Our product is software that provides automatic, intelligent response suggestions for customer support operators. We can integrate our suggestions with your existing CRM system with our plugin.”
- **DigitalGenius** – Uses AI to suggest automatic responses that agents can edit as needed. Digital Genius will also predict metadata such as tags, priorities or assignments.
- **Init.ai** – “Automate conversations, Analyze them for actionable insights, and Assist sales and support staff in communications” by suggesting responses and next steps.
- **Abot labs** – “Abot acts as a tier-1 service agent, replying to customers instantly, answering questions and fulfilling requests” while learning how to sound more human and using your brand voice.
- **IBM Watson Conversation** – IBM Watson Conversation allows you to build a bot with no coding experience whatsoever. It's also free for the first 10,000 API calls. They also offer “virtual agent” which operates as a front-line chatbot for customer service.

If you're using Front for customer support, there are several ways you can use AI in your inbox through integrations. Here are a few examples.

Forethought learns from your responses, so you can give better customer support. Forethought's AI-powered teammate Agatha Answers lets customer-facing teams find answers quickly and respond faster. The Front Agatha Answers integration automatically pulls all contextual information from across the org — like online help articles, Google Docs, past conversations, and more — directly into your agent's inbox, helping your team answer questions faster and more accurately.

MonkeyLearn helps you automate tasks with machine learning text analysis. MonkeyLearn turns emails, support tickets, chats, social media, surveys and documents into actionable data. With MonkeyLearn and Front, you can automate tasks based on the language in your messages. For instance, automatically add the tag Negative on messages from unsatisfied customers, so you can easily identify what messages need to be addressed. Or, automatically route all messages in a certain language like French, so the right teammate can answer.

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Ada will give teams easy-to-build bots for more personal, thorough customer service. The Ada integration in Front will allow you to build a bot on top of your Front inbox without needing technical help or cumbersome configuration. Your customer service team can easily teach the bot to build content, add pictures and gifs to messages, and send links to resources. It's easy to move to transfer the conversation to a human when your customers need it, and everyone has more time to send better replies. universal, which makes them highly effective for internal communication and limited for customer communication. Plus, you'll always have email, so no matter what, you're adding separate communications channels. That means context switching!

CHAPTER 7:

How to implement automation thoughtfully

If you ask Raúl Garreta, the CEO and founder of MonkeyLearn, the best productivity tool you can give your team is automation.

If you ask Raúl Garreta, the CEO and founder of MonkeyLearn, the best productivity tool you can give your team is automation.

Garreta has dedicated the last 15 years to advancing workplace automation through machine learning. Now at MonkeyLearn, he's making machine learning more accessible — so that automating a process is as easy as updating a spreadsheet or sending an email.

“Machine learning is powerful but complex,” Garreta said. “If we make it dead simple, it has the potential to disrupt multiple areas, including how we work.”

We chatted with Garreta to learn his advice for strategically implementing automation to help your team do better work.

1. Know when it's time to automate processes

It's hard to tell when is the right time to automate a process for your team. How much time would it really save? Will it be worth implementing, and will it stick for the long run? Will it be worth the investment of time and money?

Garreta says there are three ways he knows it's time to automate a process:

1. When you feel you are doing the same boring repetitive task over and over
2. When every step of the process already involves software in some way
3. When you need highly consistent criteria and results

“That's when you can validate that the process is mature enough to invest in and lives in a digital environment that's well-suited for automation,” Garreta said.

2. Pinpoint areas where automation will make the biggest impact

Sometimes speed makes all the difference, and Garreta said it's important to identify these moments for your business. For example, when a customer sends you feedback, if you reply almost instantly, you're much more likely to engage them and continue the conversation. Or, if you qualify leads in real time, you can notify the appropriate team to jump into the conversation while the lead is online.

Garreta noted another way automation can impact our workflows is not just on saving time or doing things faster, but by doing things with consistency.

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"Machines will do processes in a consistent and predictable way," he said. "That means you will obtain consistent and predictable results, which is the holy grail for many businesses. For example, when qualifying your leads, routing your support tickets or categorizing your customer feedback, consistency in the criteria is key. By automating those processes, you will enforce consistent criteria independently on how your teams change or grow."

3. Deliberately decide where automation doesn't belong

Before implementing automation, you need to identify the processes you're not automating. Certain situations, especially when it involves conversations with customers, should stay human to human — and this is up to you and your business to decide.

"Machine learning can assist humans to make them more productive, but it cannot replace a real human response," Garreta said.

4. Choose automation tools that integrate with other software

If you're going to need to rip and replace your entire tech stack to implement automation for a process, there's probably a better way. When you're building your tech stack, choose automation tools that easily integrate with other productivity software your team uses.

"We're productivity tool junkies," Garreta said. "We use Front for collaborative email, MonkeyLearn for data processing, Zapier to connect apps and automate workflows, Asana to manage our projects and tasks, Slack for internal chat conversations, Zoom for video conferencing, Segment to streamline data between apps. Recently I fell

in love with Notion, a beautiful application to create and share internal knowledge and notes," he said. "They all integrate and play nicely with one another."

5. Reassure and energize your team

One of the biggest gripes with workplace automation is the fear that it will replace humans with robots and eliminate jobs. Garreta agrees that automation will transform the workplace dramatically, but he argues it's a good thing in the long run.

"We humans will be freed up. Costs are lower with machines doing some of the work, and as a result, humans won't have to work the same amount of time that we work nowadays," Garreta explained.

His final piece of advice? Start small. "Choose a simple process. As you automate more, the impact will start compounding."



Nicereply is an all-in-one customer satisfaction survey tool built for Front that offers personalized CSAT, NPS, and CES surveys.

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