Category

Data & AI

AI-Enhanced Customer Experience & Support Playbook (Chatbots, Assistants)

A deployment method for AI support assistants and chatbots that improves resolution rates without degrading customer trust.

- Practitioner
- Intermediate
- Template Included
- Workshop Ready

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Overview

Deploy AI support chatbots and assistants using a deflection-quality balance method that lifts containment rates without the trust-destroying failures customers remember.

How many intents should the first wave cover?

Three to five, chosen for high volume, low complexity, and strong existing knowledge-base coverage. A narrow, clean first wave builds the internal and customer trust needed to expand faster in later waves than a broad, rough launch ever does.

What's the biggest single predictor of chatbot failure?

An unaudited or outdated knowledge base. The model itself is rarely the root cause of a bad customer experience — it's confidently surfacing wrong or contradictory source content, which is why the audit step comes before any intent goes live, not after.

Should containment rate or CSAT be the primary success metric?

Neither alone — track them together on the same wave scorecard. A rollout optimizing purely for containment routinely produces a CSAT decline that erases the cost savings once escalation calls, complaint handling, and customer churn are accounted for.

How is "Assist mode" different from just giving agents an AI tool separately?

Assist mode is intent-specific and built into the same escalation framework as Deflect and Escalate, so the handling mode for any given contact is a deliberate classification decision, not left to whether an individual agent happens to open a separate co-pilot tool.

How do we prevent customers from getting stuck in a bot loop?

Configure escalation triggers — sentiment detection, repeated clarification requests, and an always-visible "talk to a person" option — that override the default intent classification and force a handoff, and make sure the human agent receives full conversation context so the customer never has to repeat themselves.

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