AI Idea Starter for Customer Service

Introduction

When jumping into artificial intelligence, many organizations inventory what they're doing now and look for opportunities to automate. This "fixed pie" thinking can be limiting out of the gate. Those with the best service start first and foremost with customer needs and expectations and use them to guide decisions. In oft-cited advice, Steve Jobs, the late co-founder of Apple, put it this way: "You've got to start with the customer experience and work backward to the technology."

So, given all that AI can do, how do you best integrate it into your organization's direction? How do you ensure that it's meeting customers' needs and building your brand? An important part of the answer is to develop and use a service strategy framework. In customer service, this is often referred to as a customer access strategy or just a service strategy. An effective customer access strategy includes ten components (see table). Your customer access strategy may be well-developed—or it may need a lot of work. The key is to get started—begin to think about these components together.

Identify and Shape AI Solutions

There are two ways you will want to leverage your strategy. One is to consider how AI could positively impact ANY of the 10 components. Refer to the table for ideas in each area. Given how fast AI is developing, you may want to have a small team regularly think through each component and how AI can help.

A second way you'll leverage your strategy is to prepare for the impact solutions you choose to implement will have on ALL components. For example, an insurance company known for great service deployed a chatbot to offer assistance to customers on their app and website. Before the rollout, they thought through the impact on all ten components of strategy. Which customers might need the chatbot's help? What questions would they have? When would the involvement of a human service agent make sense? And so forth. As a result, they trained the chatbot more effectively, prepared their teams, and updated their planning processes. Implementation has been smooth and effective.

Powertip

Here's a powertip: Leverage your strategy to uncover untapped AI value. For example, an internet provider intent on tracking customer satisfaction employed sentiment analysis tools that analyze text and speech conversations, social media posts, and other sources of input. By going through their strategy, they realized these tools can also provide insight to many areas of their operation—for example, their training teams are now focusing on issues that matter most to customers.

Using your strategic plan—considering all ten components—helps you see the big picture AND the specifics that help you unlock the power of AI. It's a powerful tool in your effort to harness the potential of AI.

Component	Definition	AI Idea-Starter
1. Customer Segments	Customer segments or groupings (e.g., by geography, purchasing behavior, volume of business, or unique requirements) and how the organization will serve each segment.	**1.1 AI Customer Segmentation:** Use machine learning algorithms to segment customers based on behavior, preferences, and other variables. **1.2 Predictive Modeling:** Utilize machine learning to identify customers who are likely to churn (stop using your products and services) and predict future customer behavior based on past interactions. **1.3 Personalized Marketing:** AI algorithms can create targeted marketing campaigns for each customer segment, improving conversion rates. **1.4 Customer Lifetime Value Prediction:** AI can predict the long-term value of customers, helping prioritize customer retention efforts.
2. Types of Interactions	Major types of interactions by customer segment, e.g., placing orders, customer service, technical support, and others.	**2.1 Sentiment Analysis:** Use AI to gauge customer sentiment during interactions, which can highlight areas for improvement. **2.2 Predictive Analysis:** Identify potential issues or questions customers may have before they arise. **2.3 Trend Forecasting:** Use AI to predict trends in customer interactions, helping adapt to changes quickly. **2.4 Automatic Tagging:** AI can automatically categorize customer interactions, aiding in future analysis and decision-making.

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3. Access Channels	Communication channels (phone, chat, email, social media, text, video, app on smartphone or smart-watch, face-to-face, self-service, customer communities, etc.) along with corresponding telephone numbers, web addresses, email addresses, social media usernames, IVR menus, physical addresses, etc.	**3.1 Channel Preference Analysis:** Machine learning can analyze and predict which channels a customer is most likely to use based on past behavior. **3.2 Channel Optimization:** Use AI to analyze performance and customer satisfaction across different service channels, enabling gap analysis and continuous improvement. **3.3 Omnichannel Strategy:** AI can help maintain consistent and effective customer service across all channels. **3.4 Self-service Optimization:** AI can analyze self-service interactions and recommend improvements, enhancing customer independence.
4. Hours of Operation	Appropriate hours of operation to support customer segments, contact types, and access channels.	**4.1 Predictive Analysis:** Use AI to predict peak times and ensure adequate staffing. **4.2 Self-Service Portals:** AI can guide customers to solve their own issues, particularly outside of normal service hours. **4.3 AI Email Response:** AI can respond to emails outside of business hours, providing instant acknowledgement of received queries. **4.4 Predictive Maintenance:** AI can anticipate and schedule maintenance tasks during off-peak hours, ensuring availability during peak hours.

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5. Service Level and Response Time Objectives	The organization's service level and response time objectives. These define the organization's objectives for speed of getting help. Different objectives may be appropriate for different contact channels and customer segments.	**5.1 Predictive Staffing:** AI can predict high-demand periods and recommend optimal staffing levels to ensure customers can get help quickly. **5.2 AI Chatbots:** These can help reduce wait times by handling basic queries. **5.3 Automated Scheduling:** AI can manage agent schedules to ensure maximum availability and minimum wait times. **5.4 Virtual Queuing:** AI can manage virtual queues, providing accurate wait times to customers and improving their experience.
6. Routing Methodology	How—by customer, type of interaction and access channel— each customer interaction will be routed and distributed to the right place.	**6.1 Intelligent Routing:** AI can analyze a customer's issue and direct them to the most suitable agent or resource. **6.2 Predictive Resource Allocation:** AI can predict which resources a customer is likely to need based on past behavior. **6.3 Real-time Support Prioritization:** AI can analyze incoming queries and prioritize them based on urgency and resource availability. **6.4 Customer Journey Mapping:** AI can help visualize customer journeys, highlighting the points where customers may need specific resources.

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7. People/ Technology Resources Required	The employees and systems required for each customer segment and interaction type.	**7.1 Resource Allocation Analysis:** AI can analyze data from different types of interactions to identify what resources are needed for each type. **7.2 Performance Analysis:** AI can identify high-performing agents and successful interactions, highlighting best practices. **7.3 AI-driven Training:** AI can identify gaps in agent knowledge or performance, tailoring training programs to individual needs. **7.4 Technology Utilization Analysis:** AI can analyze the effectiveness of different tech resources in resolving customer queries, guiding future investments.
8. Information Required	The information needed (e.g., about customers, products, services, policies, etc.) to handle customer interactions, as well as the information that should be captured during interactions.	**8.1 Information Prediction:** AI can analyze past interactions to predict what information will be needed in future interactions, helping agents prepare and reducing resolution times. **8.2 Data Mining:** AI can mine customer data to provide agents with relevant information during interactions. **8.3 Document Understanding:** AI can automatically extract needed information from unstructured data sources like emails or documents. **8.4 Real-time Data Update:** AI can ensure that customer data is updated in real-time across all systems, maintaining information consistency.

Component	Definition	AI Idea-Starter
9. Analysis, Improvement	How the information captured and produced during interactions will be used to better understand customers and to improve products, services and processes.	**9.1 Continuous Learning:** Machine learning algorithms can continuously analyze customer interactions and feedback, identifying patterns and insights that can be used to improve products, services, and processes. **9.2 Predictive Analysis:** Identify potential issues in advance, allowing for proactive improvement. **9.3 AI-Driven Root Cause Analysis:** Use AI to identify the root cause of common issues, allowing for targeted improvements. **9.4 Automated Reporting:** AI can generate real-time reports on various metrics, providing up-to-date insights for decision making.
10. Guidelines for Deploying New Services	Considerations around technology architecture (corporate standards and technology migration plans) and investment guidelines (priorities for operational and capital expenditures). This step should also describe who would keep the customer access strategy current as services evolve—e.g., who has overall responsibility, how often the plan will be updated, and who has ownership of individual components.	**10.1 Predictive Modeling:** Use AI to predict customer response to new services, guiding deployment strategies. **10.2 AI-Assisted Beta Testing:** Utilize AI to simulate user interactions during beta testing, identifying potential issues before full deployment. **10.3 Customer Segmentation:** Deploy new services to targeted customer segments identified by AI, maximizing early adoption and feedback. **10.4 Demand Forecasting:** Use AI to predict the demand for new services, ensuring appropriate resource allocation and minimizing disruption.