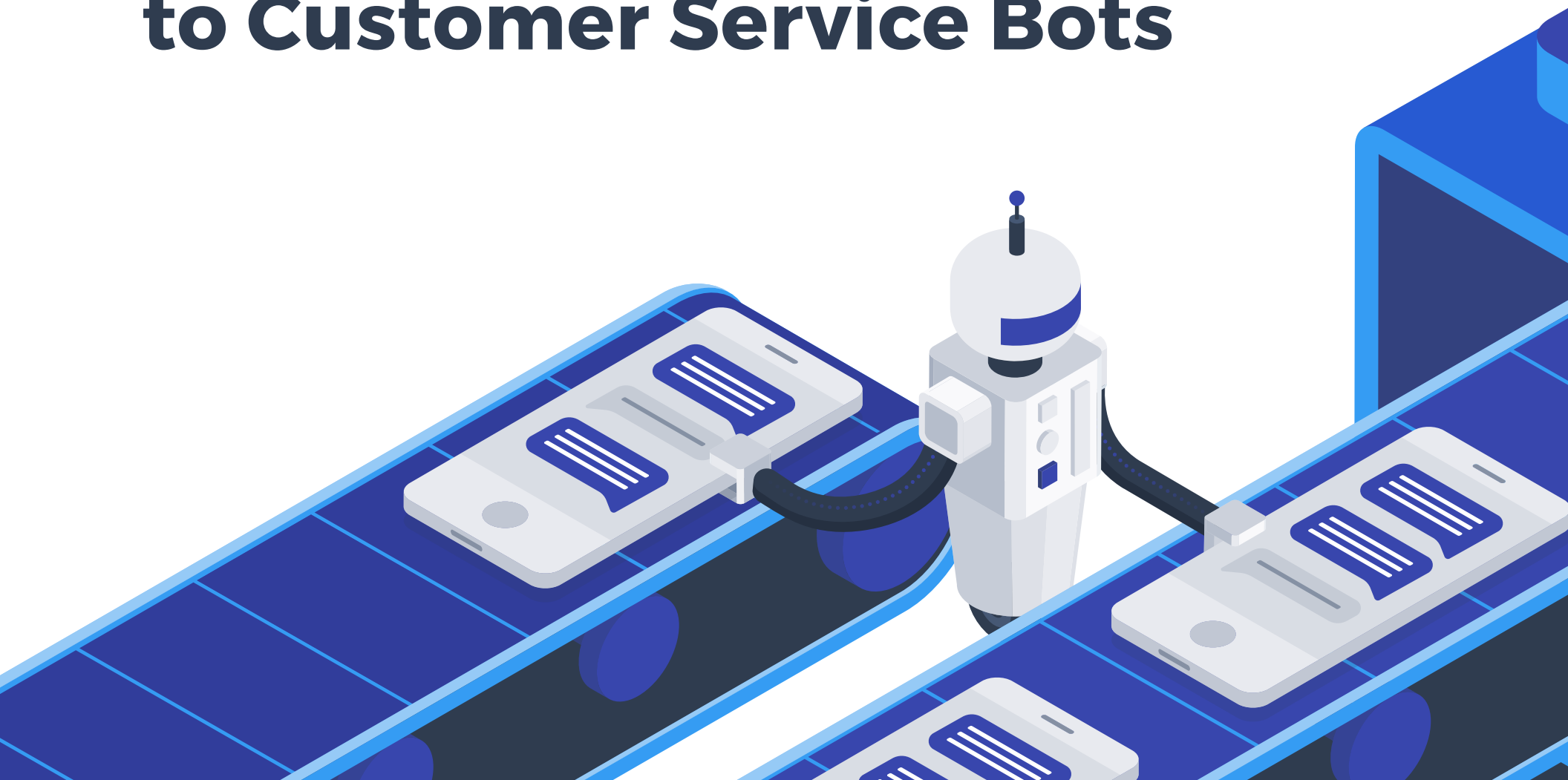
helpshift

The Beginner's Guide to Customer Service Bots



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Introduction: The State of Customer Service Bots

There's a lot of chatter about bots today, but the concept of a bot is really nothing new.

Over the last 50+ years, the bot has significantly evolved with greater accuracy and diversity of use cases across industries. But at face value, a bot — more specifically a chatbot — is a computer program that simulates human conversation. Chatbots can be auditory or text-based, with the latter becoming increasingly popular as seen on platforms like **Facebook Messenger** and for companies with web-based sales and support.

The customer service bot is a unique subset of the bot ecosystem. Its purpose is not to sound human or make small talk — rather, its objective is to rapidly lead customers through a streamlined channel of information as efficiently as possible.

So unlike other bots that require more generalized and sophisticated artificial intelligence, customer service bots do not need to learn how to actually chat with an advanced level of comprehension; they just need to make the customer inquiry process more efficient (and pleasant) than it currently is.

Considering that most Americans currently dread contacting customer service [see Figure 1], creating a better overall customer support experience should be a top priority for teams that place high value on retention and LTV (lifetime value) metrics. That, combined with the fact that customer service bots are much more mature and ready for deployment than many other forms of human-like AI, makes bot implementation very low-hanging fruit that can be put to work immediately.

Figure 1: Business Wire, *Americans Love Chatbots—If They Get Them to Humans Faster*

Why We Need Bots in Customer Service

The customer service bot provides a solution to a two-tiered problem:

Scalability:
Personalized interactions are challenging to support at scale

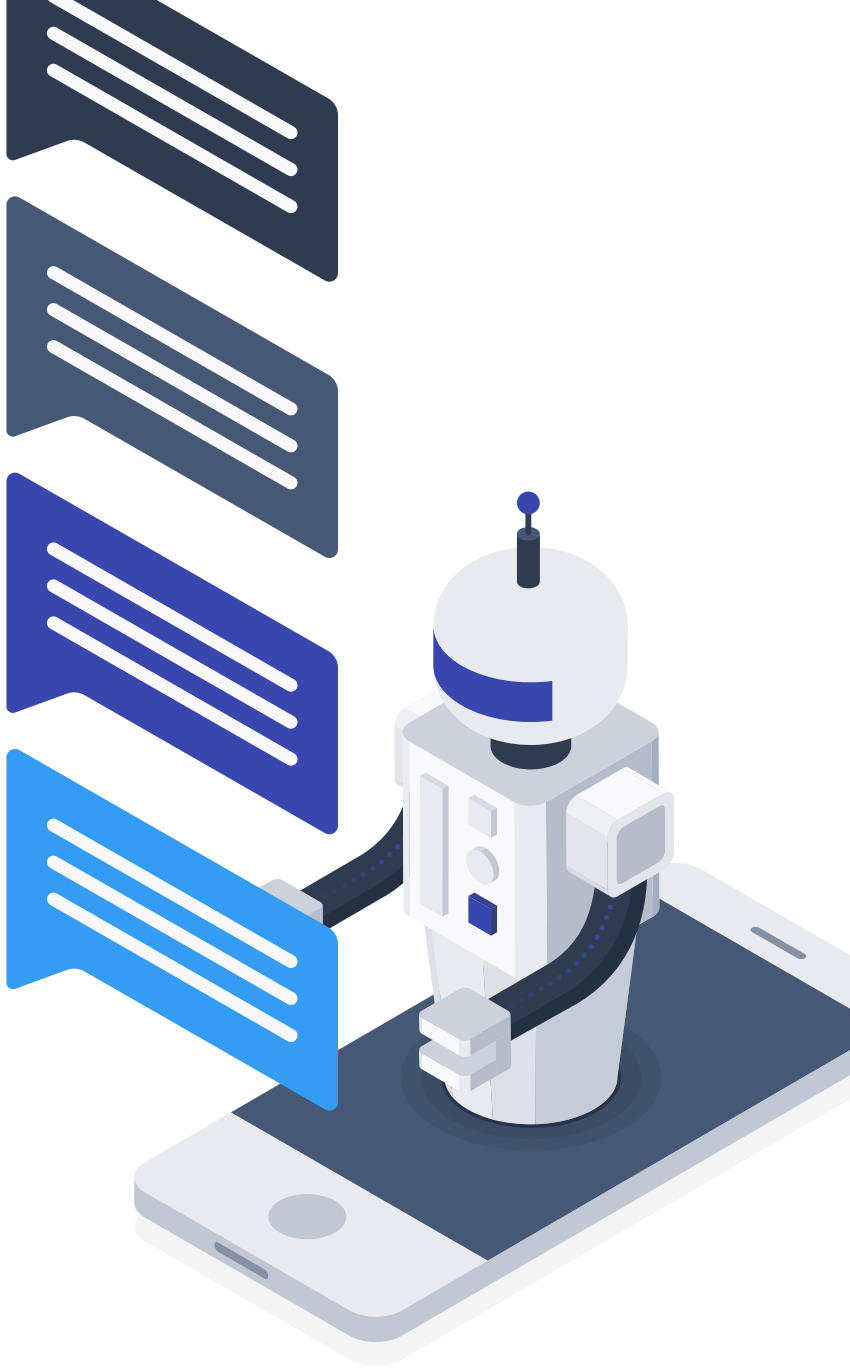
Speed:
Customers expect instant service

Both of these problems are uniquely human. Live support agents are expensive and difficult to fully staff at scale, and can be delayed in responding even when there are enough agents on the clock. Not offering messaging because of this staffing issue, however, is not a good option. That's because **29 percent** of consumers are more likely to make a purchase with the option of messaging even if they don't use it, and **79 percent of customers** say they prefer messaging to other forms of customer service.

This is where bots come in.

According to recent **Propeller Survey** on behalf of **Helpshift**, more than 37 percent of customers say they would prefer to get immediate assistance from a bot over waiting just three minutes for a human, and 55 percent of customers say they would welcome the idea of bots in the customer service process. It's easy to see why: bots respond instantaneously and can use prompts and suggestions to rapidly lead customers to an answer.

Figure 2: Business Wire, *Americans Love Chatbots—If They Get Them to Humans Faster*



**Important note:* these bots are not mimicking conversation — rather, they are guiding customers through a series of steps that lead them through self-service options or pass them on to an agent who will by then be adequately equipped with information necessary to quickly answer the customer's query.*

Unlike humans, bots are consistent and highly scalable. As opposed to a live agent who is limited to responding to a few tickets a time, bots will always provide an instant response regardless of ticket influx. Additionally, bots will maintain the same "voice" while agent disposition can vary.

This level of speed and consistency is crucial to maintain in a world where **73 percent** of customers say that valuing their time is the most important thing a company can do to provide them with good online customer service. To help you get started, we've outlined when to utilize bots in the customer journey for maximum impact in terms of speed, CSAT, and scale.

Figure 3: Forrester, *Your Customers Don't Want To Call You For Support*

An Example Customer Journey with Four Bots

A customer's support journey should never start out with a human to human interaction. Not only can a bot collect basic information faster than a human can, but it can also instantly make decisions based on this information.

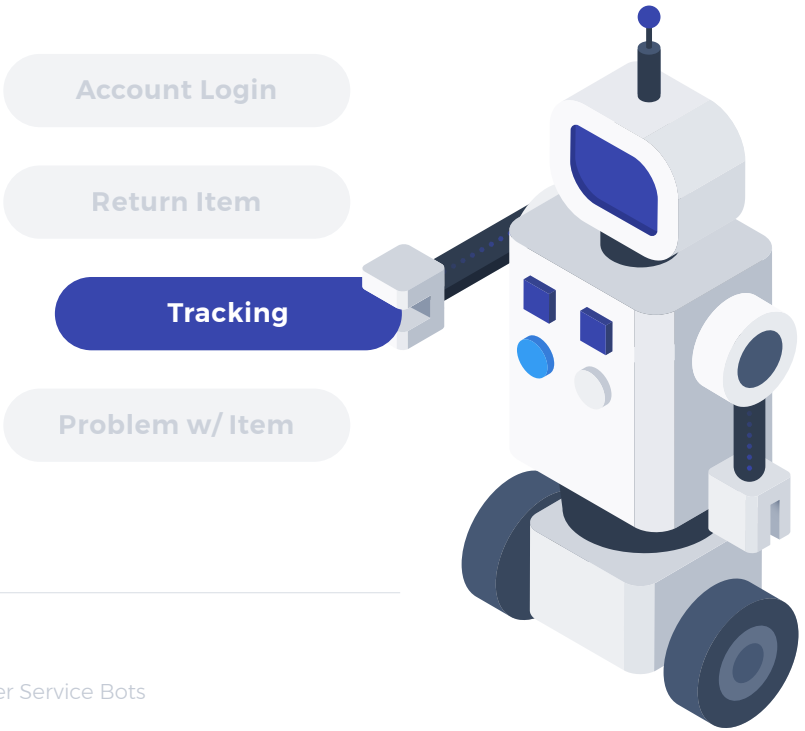
To provide an example, say that a customer deleted an email with shipment tracking information and contacts customer service to retrieve the tracking number. After the customer sends an initial message, an AI engine could immediately parse the text and offer knowledge articles via an Answer Bot based on set categories such as "Shipping", "Account Login", "Payment Issues", etc.

Once the customer reads the article on shipping issues and requests additional assistance, a bot would be invoked to collect additional user information and present the user with most recent orders.

The moment the user selects the applicable order, the bot would present options of potential shipping problems with the order from which to choose — e.g. "Return Item", "Shipment Tracking", or "Problem with Item". When the user selects "Shipment Tracking", the bot — perhaps already connected to a third party shipping provider — instantaneously gives the tracking number and latest shipment update.

Now, this first example shows a conversation in which a human agent is never necessary. By introducing bots into these routine requests that can be fully automated, support teams can massively reduce ticket backlog and save agent time for more complex requests.

However, while an agent should never begin the conversation, there should also be provisions upfront like "none of the above" or "article not helpful" so that users can be routed to an agent when necessary, avoiding any potential frustration or inefficiencies.



Essentially, the best customer service journeys are partially automated with easily accessible escape hatches for users to contact live agents.

The five different steps that can be automated are:

1. **Self-Service Suggestions**
2. **Information Collection**
3. **Issue Categorization**
4. **Custom Workflows**
5. **Feedback Collection**

There are a few automations that serve as a baseline that every customer service team should be using.

Easy-to-resolve queries that can be addressed wholly through self-service should only reach bots and never be routed to an agent. In more unique cases, however (or in cases where a customer simply wants to speak to an agent), the agent could still enter once the ticket is created, as outlined below. The flow of your customer journey should progress as follows.

Step 1: Use an Answer Bot as a First Line of Defense

This bot promotes self-service by suggesting knowledge base articles that address the user's inquiry. For instance, if a user asks "where do I see my purchase history" — the bot could suggest a knowledge base article (or even a GIF or video explanation, depending on how robust the knowledge base is) showing where to find this information.

This bot is particularly interesting because it leverages machine learning to learn and improve over time. After offering self-service options, the bot will let the user select whether or not the knowledge base article(s) were helpful. The bot therefore can improve its accuracy by gathering feedback from its users. Support teams then have increased visibility into which articles are working and which are not, and can revamp accordingly.

Step 2: Invoke a Bot to Collect Additional Information

Much of an agent's time is taken up by the back and forth associated with requesting routine information. Thanks to simple but necessary questions like asking for name and account number, the agent oftentimes spends the bulk of an interaction just getting basic information before being able to address the heart of an issue.

Before a ticket is even created, this information collecting bot efficiently replaces the need for this step by asking users to enter their own information. Some bots will present button options for the user to select from (iOS vs. Android, for example), while others incorporate the data into the ticket information, once the ticket is created. The bot can also suggest options: for instance, if customers say they want to return an item, the bot can present the last five items purchased and ask users to click on the one they want to return.

Step 3: Automate Issue Selection and Categorization

Using machine learning, issues can now be automatically classified with a high degree of accuracy. This step does a lot of the heavy lifting, as it both allows bots to further deflect tickets through automated workflows, and helps route the issue to the correct agent in the event that automations are not adequate. Once the issue is categorized, a ticket can be automatically created and sent to the agent who is best equipped and available to answer it.

Step 4: Deploy Use Case Specific Bots

Depending on brand-specific use cases, customizable bots can now be infused into the conversation to lead users down different paths depending on the issue at hand. For example, if users have been locked out of their account (this makes up a large percentage of issues for mobile gaming companies), bots can collect the information needed and work with the user on the steps necessary to unlock the account. If the user is still unable to gain access, the user can then be connected with the right agent who already has much of the information needed to assist.

***These custom bots can also be invoked prior to opening the ticket, depending on the use case.*

Step 5: Feedback Collection

Regardless of whether the conversation has been entirely handled by bots or has been handed off to an agent, the feedback collection bot should still be the last touch point between the customer and the brand. Unlike traditional forms of feedback gathering (email surveys, for instance), this bot follows up immediately after customers have found what they're looking for, and does so within the conversation thread. This encourages users to give feedback and provide a CSAT rating by removing the extra steps associated with most forms of survey collection.

How to Get Started with Bots

It's likely that your customer service journey already looks very similar to the one outlined above, with the primary difference being that each step is handled manually by an agent or supervisor.

Automating aspects of this process will quantitatively improve the metrics below as well:

Improved first contact resolution, as both agents and customers will have far more information at hand to resolve tickets within the initial conversation.

Decreased ticket volume, as self-service options will be optimized and used significantly more.

Improved time-to-first-response, as all users will receive an initial response immediately.

Improved CSAT ratings, as users will have quicker and more efficient service, and agents will be able to focus on delighting customers with more complex requests.

Many top companies have already integrated bots into their customer service journey: according to that recent Helpshift survey, 48 percent of consumers have already interacted with a bot in the past year for customer service inquiries, and 65 percent of millennials want bots involved in the customer service process. Bot-based service is on it's way to becoming the new normal, as brands continue to prioritize operational efficiency and customer satisfaction side by side.

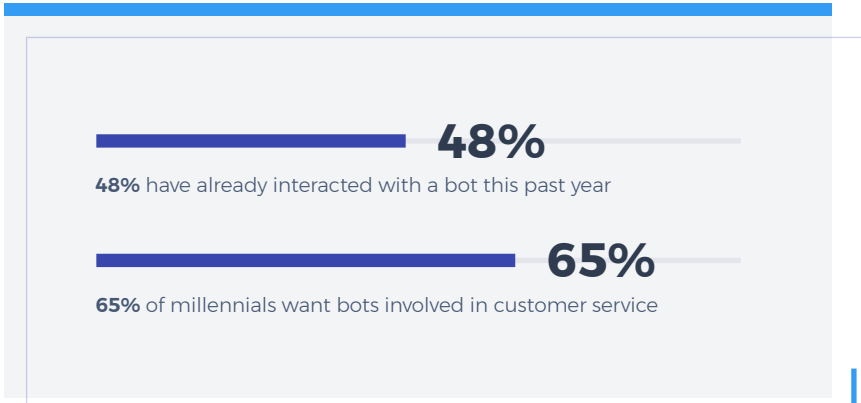


Figure 4: Business Wire, *Americans Love Chatbots—If They Get Them to Humans Faster*

About Helpshift

Helpshift bridges the disconnect between conventional customer service channels — like email and phone support — and a growing consumer base that does more on mobile phones and has a strong preference for messaging as their primary mode of communication. Through Helpshift's AI-powered support platform, companies can resolve issues more efficiently, boosting customer satisfaction in the process. Companies such as Xfinity Home, Microsoft, Supercell, Vivino, Zynga and hundreds of other leading brands use the Helpshift platform to provide messaging-first customer support. Helpshift is installed on two billion devices worldwide and serves more than 820 million active consumers monthly.

To learn more about Helpshift, visit helpshift.com and follow @helpshift on Twitter.

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