

Unlock the power of AI for customer experience

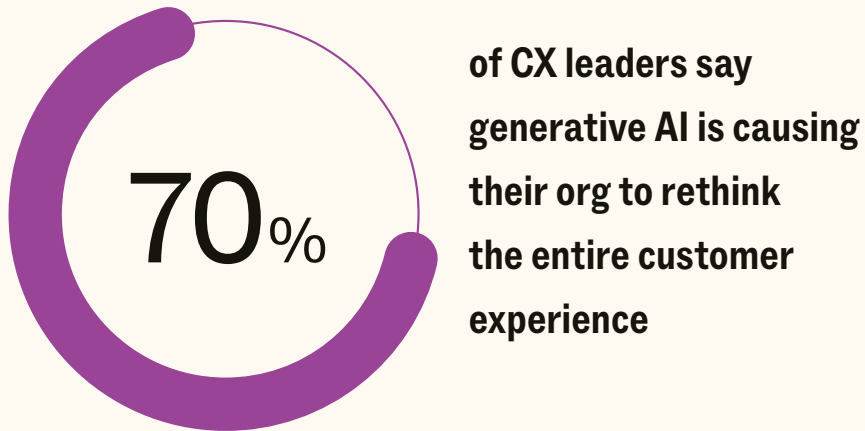
Boost team productivity while enabling personalization at scale

Delivering stellar customer service has always been a challenge. And while AI promises to revolutionize every aspect of how the customer experience is created and delivered—opening the way toward intelligent CX, in which customers will enjoy truly immersive experiences, agents will be more productive, and businesses will reap significant cost savings—that doesn't mean things will get easier for companies.

If anything, AI introduces more complexity. And as Zendesk showed in its [CX Trends 2024 Report](#), this monumental shift in CX is happening whether leaders are ready or not. These changes are being driven not only by the technology itself but by customers: 59 percent of consumers believe that generative AI will completely change the way they interact with companies in the next two years, and for



those who have already experienced the technology first-hand, that number jumps to 75 percent.



With the rise of AI usage by customers comes expectations that businesses will use the technology to create highly personalized, empathetic experiences. But as CX leaders are discovering, getting there isn't easy. They're facing the vexing challenge of implementing AI effectively, but as they navigate this new territory, those leaders have landed on opportunities in three key areas:

Customers. CX leaders understand that AI needs to be used to deliver personalization on preferred channels, with fast issue resolutions and rock-solid data privacy practices. AI will play a significant role in helping companies build deeper, lasting connections with their customers.

Agents. AI will be a key element in preventing agent burnout and turnover, while also playing a significant role in increasing team productivity.

Business efficiency. Finally, CX leaders believe AI will help them better gauge service quality, which will help inform efforts to retain customers, cut costs, and find new revenue opportunities.

If that seems like a lot, you're in good company. The stakes couldn't be higher—companies that fail to navigate these new

waters will find themselves at a competitive disadvantage. That's why CX leaders must lean on a trusted partner, one with a long history of innovation in customer service.

In this guide, Zendesk's team of AI experts has put together key best practices to follow so you can implement this game-changing technology successfully. We'll also identify areas that we think will be transformed in the near future, providing tips for how to future-proof your CX organization.



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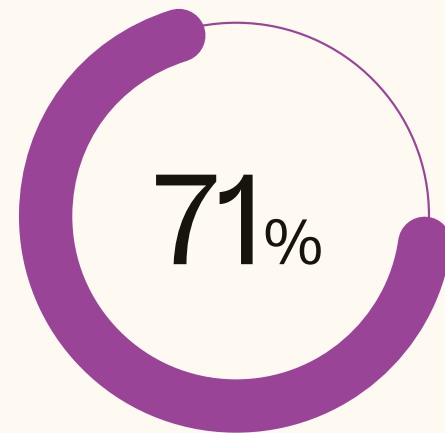
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01 Optimize your team productivity and efficiency with AI

Implementing AI into customer experience operations might feel overwhelming, but don't worry. The following best practices will provide quick, measurable results. First, let's take a look at how AI can provide immediate ROI by improving how your team works.

By giving your agents an AI-powered workspace with insights, tools, and recommendations, your team will operate much more efficiently, and customers will experience better outcomes.

These AI tools can also help CX leaders understand how agents are performing, identify areas for improvement, and manage their workloads for optimal performance.



71% of CX leaders say it is critical to have generative AI tools embedded directly into the tools agents use



By choosing the right AI tools and training agents accordingly, CX organizations should save upwards of 220 hours of labor per month while increasing productivity by 10 percent. Here are some key ways AI can help you achieve those gains:

Lean on AI to route incoming requests to exactly the right agents for the job.

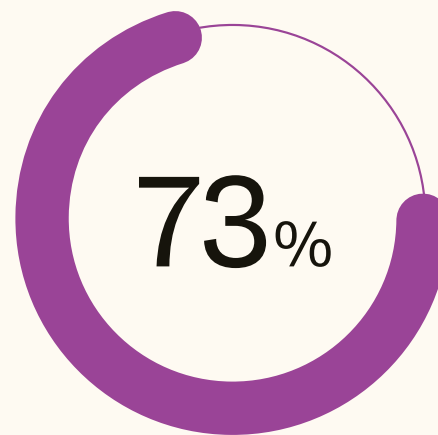
Manual triage takes significant resources and is not nearly as efficient as AI. A well-designed AI tool can work behind the scenes, ensuring that the most difficult issues are automatically routed to experienced agents. That leads to optimal team performance and better experiences for customers.

Use AI to analyze customer sentiment before agents respond, and then provide full customer context. Agents don't enjoy being blindsided by an angry customer, and those customers rightfully expect agents to

know who they are and be ready to assist them quickly. AI can prepare agents for a challenging interaction while providing key bits of information found in disparate systems, such as customer identity, transaction history, and previous service requests.

Conduct thorough agent QA with AI.

In the past, CX leaders could check just a small sampling of interactions to ensure service quality was up to company standards. Now, thanks to AI, you can gain a comprehensive understanding of individual and team performance. That will reveal areas for improvement, training opportunities, and positive and negative trends in your CX delivery.



of CX leaders report positive ROI from leveraging AI and automation

Liberty London uses AI for better ticket routing

UK retailer Liberty London uses AI to identify and label incoming tickets so they get routed to the right place. With smarter routing, Liberty's response time has dropped by 73%.

LIBERTY.

Help your agents strike the right tone with AI. Ensure they always deliver the best reply with writing tools powered by generative AI. These generative AI tools make it easy for agents to quickly craft responses, including shifts in tone. For example, Zendesk's agent workspace has AI functionality that offers agents a simple drop-down menu that they can use to receive response suggestions that are friendlier or more formal.

AI can surface contextually similar tickets to agents, resulting in quicker resolutions. Instead of having to research a common issue over and over, agents can see how a more experienced coworker handled a similar issue, thus saving time. That means agents will be able to resolve more interactions, and customers will spend far less time waiting for a resolution.

Simplify scheduling, forecasting, and real-time reporting with AI-powered workforce management (WFM). An AI-powered WFM solution can be a game-changer for CX leaders by taking the guesswork out of resourcing. Here's the powerful assistance that AI can provide to CX leaders: by analyzing past peak support times and other data, these new agent management tools can offer much more precise staffing forecasts and real-time analytics for agent performance. That leads to better customer outcomes across the board: shorter wait times and faster issue resolutions due to continual improvements in agent performance.

These are some of the powerful ways CX leaders can implement AI behind the scenes to streamline and improve how their teams work. In the next section, we'll explore how AI can be used to build more durable customer relationships.

How AI helps JobAdder's agents hit the right tone

JobAdder agents use AI-generated ticket summaries and tools to quickly shift the tone of their replies, allowing them to shave 30% off ticket handling time.

JobAdder

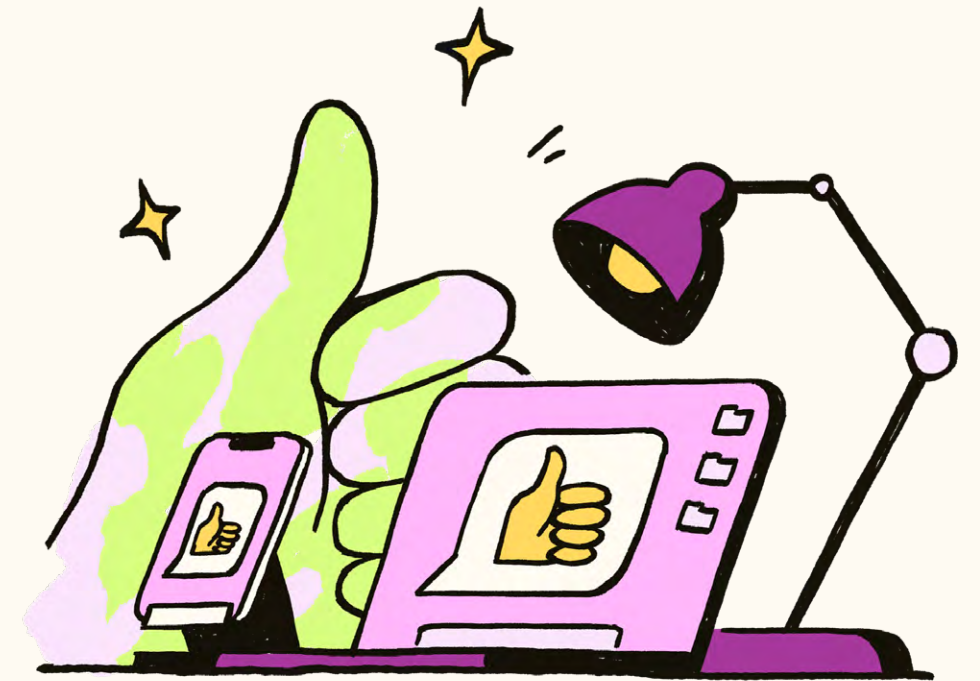
02 Use AI to automate service while creating deeper connections with customers

CX leaders rightly see AI as a way to turn what are traditionally seen as cost centers into bona fide revenue generators. As we saw earlier in this guide, AI can automate time-consuming tasks such as triaging support requests—but it can do far more.

Zendesk has been tracking customer demands for years, and one trend has bubbled to the surface repeatedly: personalization. Customers know that companies possess significant amounts of their personal data, and they want those businesses to put that information to work,

creating hyper-personalized experiences that feel rich and warmly human.

AI will make this possible for companies, and there's compelling reasons to do so. The competition for customers is as fierce as ever, and the cost to acquire new customers creates pressure to retain existing consumers (it costs anywhere from 5 to 25 times more to attract a new customer than keep one). Those customers have also made it clear that if the experiences with companies fall short of their expectations, they'll quickly bolt for the competition.



And if that wasn't incentive enough to lean into AI for personalization, there's the fact that loyal customers will provide the kind of lifetime value that makes or breaks a business's bottom line.

To forge lasting, deeper human connections with your customers, put AI to work. Here's how.

Empower your AI agent to resolve common customer requests. AI agents can handle common customer requests—ones answered in your knowledge base, such as password resets and return policies—which frees up human agents to handle interactions that are more complex or simply require the human touch. For example, with Zendesk AI agents can be trained on common issues so customers can get instant answers to their questions.

Use AI to suggest automated replies to your human agents. AI can quickly pull relevant knowledge base articles for your human agents to share with customers. Much like how AI can help human agents craft tonally relevant responses to customers, it can serve as a trusty assistant that shaves time off each interaction while providing the exact information a customer needs.

Motel Rocks puts AI agents to work

Motel Rocks responds to customers faster by using AI agents, enabling the company to slash ticket volume in half and improve CSAT by 10%.

M O T E L

Quickly expand and enhance your knowledge content with AI. Your AI and human agents need a robust, accurate knowledge base to work from—and let's not forget that customers often want the ability to resolve their problems on their own. By using AI tools designed to optimize knowledge bases, you can identify gaps in content while helping agents craft or revise new articles.

Be sure to match your AI agents' tone to your brand. Customers are comfortable chatting with AI agents, and their expectations for increasingly human-like interactions keeps growing. A good CX tool will enable you to tailor your AI agents so they sound natural and strike the right tone—one that aligns with your brand's voice.



03 Take action now—and prepare for the future

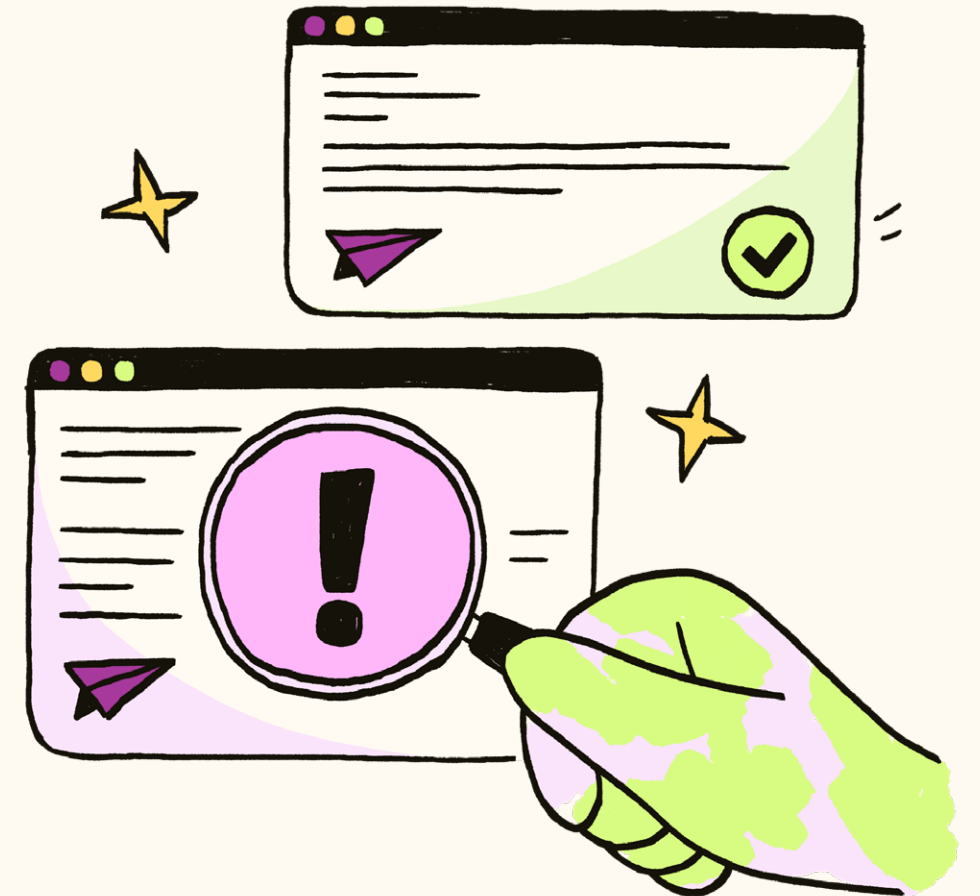
You should now have a clear idea of all the ways AI can enrich and improve your CX. From boosting team efficiency to helping your business build deeper relationships with customers, AI tools will touch every single aspect of your CX operations.

By leaning into AI now, you'll be setting your CX organization up for success. In these early days of AI, change will come at a quick pace, so it's essential as a leader to keep your eyes on the horizon.

Be transparent with customers about AI decisioning. As seen in the CX Trends 2024 Report, 48 percent of customers outline

increased difficulty telling the difference between AI and humans. AI transparency will be an essential element in communicating with consumers.

Understand that as a CX leader, you are now a crucial stakeholder in protecting customer privacy and implementing strong security practices. CX leaders will play an important role in ensuring AI tools are used properly so that customer privacy is safeguarded. Stay on top of regulations and best practices, and make sure you're working closely with other key stakeholders, such as your IT and legal departments.



Don't forget that basic CX best practices are the foundation that will enable successful implementation of AI. While AI will supercharge your operations, some standard best practices will serve as the bedrock of your CX. That means offering omnichannel service, robust self-service options, and so on.

AI tools are rapidly evolving—not only will you need to stay informed, you must invest in training for agents so they feel confident in using them. In the CX Trends 2024 Report, Zendesk discovered a serious disconnect between CX leaders and agents on AI tools and training. CX leaders reported providing significant amounts of AI training, yet agents overwhelmingly said they hadn't received enough education. It will be vitally important to remain up-to-date on AI advancements while also investing in comprehensive training for agents.

Choose a trusted partner to ensure you're setting up your organization for success.

As many CX leaders are realizing, implementing AI in their operations requires forging alliances with trusted partners. Remember, you don't have to go it alone.

As you explore this exciting new world, Zendesk will be here to help. A trusted partner with deep CX expertise, we're leading the charge in leveraging AI across every layer of support operations. When you partner with Zendesk, you'll be able to not simply navigate the rapid changes fueled by AI but take full advantage of them.

To find out more about how to leverage AI across every layer of your support operation, contact Zendesk today.

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