Self-service—you're already doing it, now do it with AI

Bridge the gap between customer self-service
and the scalable, AI-powered experiences of tomorrow

A smart approach to customer self-service is essential for a business to scale efficiently. But you might not know that self-service channels are a great way to start making AI work for your customers, your agents, and your business. In this whitepaper, you'll learn how AI-powered bots and robust knowledge bases are helping small businesses deliver great customer experiences alongside expert humans.

Small businesses may be AI curious, but a common concern is being under-skilled, underfunded, or otherwise under-resourced to test the waters. Emerging technology like AI for CX is already changing how companies deliver customer experiences, and it's changing customer expectations of those experiences. Companies can't afford to let perfect be the enemy of the good. After all, many of the same business leaders who thought investing resources into building a self-service infrastructure have since experienced the many **knowledge management system benefits**.

In this whitepaper, we'll outline some common myths —and the unscary realities—that will enable and equip small business leaders like you with the AI best practices you can start implementing today. Start shaping your AI point of view. Test what does and doesn't work for your customers. And start considering how to build AI into your business strategy in the short, medium, and long term.

Myth:

I'm a leader in a small business with a small team and a conservative budget. AI isn't worth the investment right now.

Reality:

AI will help you scale with the headcount you have now—and it'll probably make those people's lives easier.

On the **Conversations with Zendesk podcast**, host Nicole Saunders spoke with Jared Loman, Vice President of Customer Experience at **Kajabi,** and Zendesk's Caitlin Keohane, Senior Vice President of Global Customer Advocacy, about how AI helps businesses tighten costs. Here, Loman sees generative AI as a tool that supports agents by making suggestions on the next best action to take with a customer or helping conduct all-important **customer sentiment analysis** during those touch-and-go moments.

Myth:

Our agents are way too busy to write, research, and update knowledge-base articles, let alone add a new, untested tool into the mix.

Reality:

Agents should already be contributing to your knowledge base with every ticket solved—AI is a short jump from there with potentially huge impact.

These days, agents are expected to contribute to knowledge management—writing, editing, and choosing topics to write about, which helps enhance the self-service experience. Where this once required manual analysis of tickets, AI can now help identify the most commonly asked questions within tickets and get knowledge base articles up and running for knowledge management experts to finesse.

Your agents should be busy helping customers when they need 1:1, human-centered support. AI and bots can help them here, too, by surfacing relevant help center content to solve customer queries more efficiently.
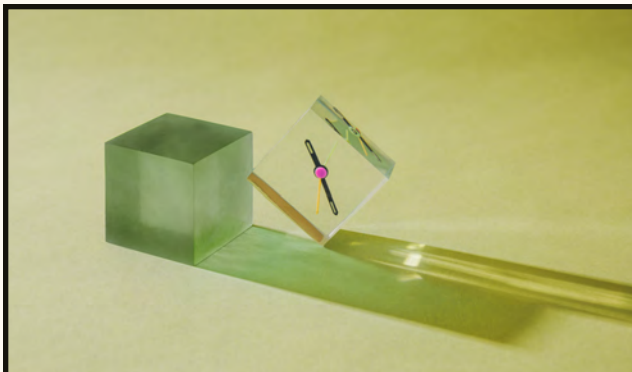
Myth:

What about that skills gap? We're just getting going with knowledge management and I don't have anyone who is that familiar with AI.

Reality:

The gap isn't as wide as you think.

Some IT teams feel unprepared for the generative AI wave due to skill gaps in their teams, a common sentiment in the **2023 Zendesk report for IT leaders**. The businesses with an edge on their competition are working with best-in-class partners to help make generative AI both accessible and operational as their knowledge management practices mature. True, many generative AI solutions require long lead times and implementation, making them unrealistic for many small businesses. Good news: out-of-the-box generative AI bots can be trained on your company's existing knowledge base material, learning on day one how to streamline your self-service channel.

Furthermore, many of the skills you're already looking for and **cultivating** in support agents are transferable as you build an AI-enabled knowledge base. Written-communication skills, empathy, and patience, for example, are all qualities that agents on your team must possess in order to succeed. No better people to teach a language-learning model how to create brand-right, customer-focused content.

Myth:

Generative AI/ChatGPT is too new, and the copy it writes is weird. I have someone on my support team who can do that and it sounds way better.

Reality:

You can have your AI and your agent, too.

AI will try its best—and you can and should tell it where it's wrong.

AI-drafted content, be it help center articles or live support tickets, won't be perfect right off the bat. But continue populating your knowledge base with the content that your team already identified as known questions or concerns. For example, many support leaders already know to pay special attention to one-touch tickets: the ones resolved with a simple response. Training AI to find and draft this content for the help center can be a huge time-saver. Assign someone to review what AI churns out, and use that human brainpower to identify what customers really need at different parts of their journey with you. Soon enough, those frustrating, "dumb" chatbot conversations we're accustomed to will become a thing of the past.

In that not-so-distant future, a customer-service chatbot will receive a question about a refund, retrieve the most relevant answers from your help center, and customize a conversational, brand-right response. As the role of agents evolves, their expertise will be valuable in training out-of-the-box generative AI bots to become better and better. Over time, this enables your customer service team and knowledge base to scale, even with stable headcount and flat budgets.

For an AI-enabled self-service initiative to succeed, workstreams will indeed be modified. Expectations must be set among leadership, and someone in-house must be tracking its relevance and success for both customers and employees, communicating with stakeholders across the business. It'll take consistent investment, including driving customers and employees to the knowledge base via links within tickets, in order to truly reap the rewards. AI is uncharted territory for a lot of leaders, but a knowledge base is a great way to support your business, skill up your agents, and get familiar with the customer service best practices of tomorrow, today.

OK, I'm listening. What's next?

Remember that a knowledge base is a dynamic representation of ebbing and flowing customer needs. With forethought, resourcing, and the right tools in your tech stack, such as AI, your knowledge base will scale alongside your business and your growing customer base.

Start learning more about AI for CX.
zendesk.com/blog/zendesk-ai-for-cx/

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