

ZENDESK INSIGHTS

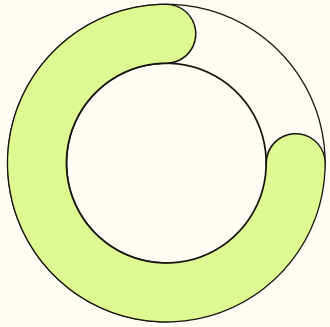
Unlock greater quality and efficiency for self-service with AI

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CX Trends 2024



In the 2024 CX Trends report, Zendesk provided a glimpse of the near future, one in which data and intelligent experiences will transform the customer journey in startlingly new ways. This AI-fuelled area of innovation will be marked by a shift where chatbots evolve into true AI agents, capable of resolving a wider range of issues while adhering to your business's brand voice.

What CX leaders have been telling Zendesk is clear: they're optimistic that AI can solve many of their challenges, such as understaffing and the ever-increasing volume of customer requests. Those same leaders also believe that the investments necessary to effectively implement AI at every stage of the customer journey – and agent experience – will reap rich rewards.



65%

of CX leaders say traditional customer service methods are outdated compared to the efficiency of AI and bots

One stage has emerged as a priority – self-service. Almost three-quarters of CX leaders see opportunity in leveraging AI and automation to reduce costs and improve service.

Companies that are active in managing their knowledge bases see 2.5 times the rate of self-service

However, harnessing the full potential of AI to deliver quality self-service experiences isn't a matter of simply throwing a switch and letting it go to work. CX leaders must take the correct foundational steps to properly unlock AI's full potential.

In this guide, you'll discover tactics which other companies have successfully used to deliver AI-powered self-service – which includes a wide range of applications from evolved bots (also known as AI agents) to automated responses to sentiment analysis – as well as tips on ensuring accurate advice, enabling smooth bot interactions and striking the right tone or personality of bots. These steps aren't optional – they are crucial for safeguarding and elevating customer satisfaction.

Zendesk has been championing AI in CX for years and our team of experts has developed this set of best practices, so you can focus on maximising the effectiveness of AI in self-service. If you follow these guidelines, your business will be able to provide a more responsive, intuitive and satisfying customer experience.

BEST PRACTICES

- 1** Treat your knowledge base as a strategic asset for AI success
- 2** Ensure your bot conversations feel natural and human-like and effectively use your knowledge base
- 3** Actively shape your bot's personality to reflect your brand values and be transparent that it's a bot to avoid confusion
- 4** Steer clear of isolating the bot, and focus on weaving it seamlessly into the rest of your service experience
- 5** Integrate contextual data to guide the customer and to ensure a seamless transition to agents

BEST PRACTICE 1

Treat your knowledge base as a strategic asset for AI success



Delivering AI self-service effectively hinges on several factors, but you'll want to start with the foundation: building and maintaining a robust and organised knowledge base. There's no way to cut corners here – in order to deliver quality responses, AI must have a dataset it can learn from and use as a source of relevant information.

But what makes a good knowledge base? Here are a few guiding principles to set you on the right path.

Empower agents to identify knowledge gaps

Here's where human management of AI comes into play. As previously mentioned, AI in self-service will only be effective if the knowledge base it draws on contains accurate, relevant information. Human agents must be encouraged to review every service interaction to see if an existing knowledge base article could have answered the query.

Consider using advanced tools that offer intent suggestion capabilities too – these AI-driven

features help identify and categorise the most common topics your customers enquire about.

Create a knowledge base article to solve that issue

Once you've identified gaps in your knowledge base, it's time to start addressing those needs. This is not the time for flowery language. Write clear, simple statements and avoid buzzwords or jargon. And don't neglect organisation: content must be grouped logically for easy navigation.

However, CX teams often have trouble regularly updating and publishing articles, whether due to workload or confidence. Leveraging generative AI capabilities can be a gamechanger in this scenario, empowering teams to use the tool to quickly and efficiently generate knowledge base articles.

Direct customers to those knowledge base articles using bot flows

Once you've filled in those gaps in your knowledge base (remember that it'll be a continual process), the next important step is to direct customers to those articles. Automated bot flows can be highly effective here. CX admins can use these tools to seamlessly direct enquiries to the right articles, which boosts team efficiency and makes customers happy.

CUSTOMER STORY

At Motel Rocks, the introduction of self-service enabled the customer experience team to keep pace with the growing demands, with 43% of tickets deflected by bots and customers leaping at the opportunity to resolve their own issues without human assistance.

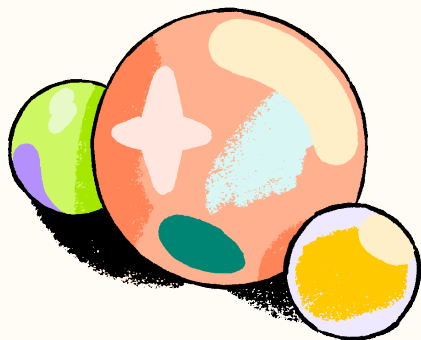
“We implemented Zendesk AI earlier this year, it’s ready straight out-of-the-box and everyone knew what they were doing. It’s really intuitive, we didn’t have to change any core processes, it is just another button that will help you and show you the information.”

Lucy Hussey, Customer Service Manager

M O T E L

BEST PRACTICE 2

Ensure your bot conversations feel natural and human-like and effectively use your knowledge base



With a robust knowledge base established, generative AI can provide quality responses to customers, just as a human agent would. In the past, AI may have been used to direct customers to the best article based on probabilities. But now generative AI can use that article text and respond directly to customers in a conversational way. That's a gamechanger.

Enhances the customer experience with direct information

Delivering precise and relevant information without redirecting customers through links not only enhances user experience but also reduces the time customers spend searching for answers. This immediate delivery of information increases customer satisfaction and trust in the self-service tool.

Generative replies lead to better bot interactions

These AI-powered responses adapt dynamically to customer queries, providing relevant and personalised answers. Platforms like Zendesk enable this functionality, giving admins the ability

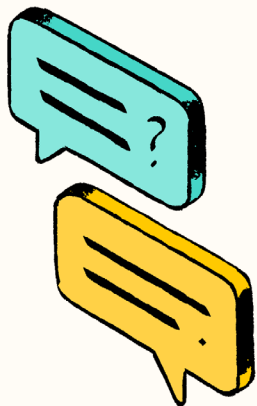
to customise bot flows so that some queries receive generative responses, whilst others get routed to human agents or to a self-service article. That ensures customer enquiries are met with the most suitable response type.

Avoid the pitfalls of redirection

Simply providing links can make customers feel overwhelmed or lost, especially if the content doesn't exactly match their query. By integrating knowledge base content directly into interactions, bots can offer a more targeted and relevant response, reducing customer frustration.

BEST PRACTICE 3

Actively shape your bot's personality to reflect your brand values and be transparent that it's a bot to avoid confusion



Self-service is a valuable opportunity to share your company's brand and values. However, while a bot should serve as an extension of your brand's identity, there are potential pitfalls. If the right guidelines aren't in place, your bots can confuse customers and damage your brand.

How to make your bot an extension of your brand

First, make sure you have a clear understanding of your company's brand and tone. Once you have a solid handle on that, you can shape the self-service experience by giving your bot a persona that aligns with your brand. And, to humanise your bot, you can use a tool like Zendesk Advanced AI, which enables teams to select "generate variations" for all standard responses, making a bot's default conversation mode more natural.

Create a bot avatar that distinguishes it from a human

For many customers, online chat is their first point of contact with a company. If that experience is with a bot, those customers need to know that. Be

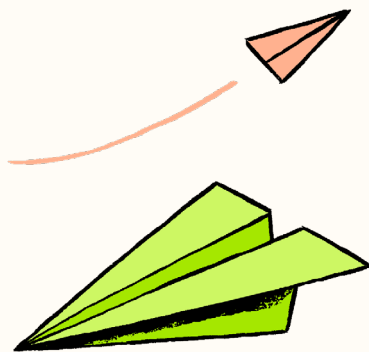
sure to give it a name and an avatar distinct from a human's name. For example, that could be "Joe's coffee bot," or simply "Support bot."

Initiate bot conversations by advising customers on how to interact with them

Be prescriptive about what your bot can do for customers. Examples: "Go ahead, ask me something" or "Here are the top things I have been asked, are any of these what you are looking for? If not, go ahead and ask."

BEST PRACTICE 4

Steer clear of isolating the bot, and focus on weaving it seamlessly into the rest of your service experience



Sometimes AI has trouble helping a customer. The danger here is trapping your customers in a frustrating loop, a surefire way to damage your brand. Here are some tips for avoiding this issue.

Set up disambiguation prompts for bots when they are unable to understand the customer intent

If a bot doesn't have a flow set up to answer a customers' intent, set up disambiguation prompts with a clarifying question. For example: "I'm not finding an answer for that question: is it one of these 3 things?"

Set up bot flows to ensure customers aren't locked in loops

While talking to bots can deliver great experiences for customers, it's possible for conversations to take too long and fall into a circular loop. Build necessary bot flows to ensure customers are given a clear path to speak with a human.

Use semantic and federated searches for greater content access

When a customer misspells a request ("refond" instead of "refund", for example) semantic search can deliver a better experience for customers ("It looks like you are looking for information about refunds? Is that right?"). List the relevant options for the customer rather than require them to rephrase the question. Meanwhile, federated search pulls from a variety of sources, increasing the chance your bot will serve up the correct information.

Integrate contextual data to guide the customer and to ensure a seamless transition to agents



Bots need to understand the customer's intent. One effective way is to give the bot data about which website the customer was viewing when they started the conversation. When self-service cannot deliver, that context can empower human agents to deliver the right help.

Proactively inform your customers about self-service options and be clear about what they can do

Your bot should anticipate the need for self-service. For example, if a customer is on a checkout page and inactive for ten seconds, the bot should proactively pop up and ask if they need help. Be clear on what capabilities are available to customers, rather than offering a generic greeting such as "What can I help you with?".

Enhance self-service offerings with context-aware suggestions

Make these offerings more relevant to customers by ensuring the bot is context aware. For example, a customer interacting with a bot on the order page

of a website should receive relevant questions, choices, flows and suggested articles about purchasing, refunds or returns.

Use context and customer journey details to seamlessly escalate to agents

If your team can't enable end-to-end flows, at the very least pass the context about the customer journey, such as intent and customer selections, to human agents so they have the information needed to serve customers instantly. That minimises instances where a customer has to repeat information they just shared with your bot.

Stay on top of the trends

To stay ahead in today's fast-evolving business landscape, embracing AI is crucial, especially when it comes to enhancing the quality and efficiency of self-service. Zendesk, with its powerful combination of AI innovation and deep CX expertise, is uniquely positioned to help you lead this transformation.

For instance, Zendesk's generative replies for bots can deploy conversation bots quickly, using your existing knowledge base to deliver personalised responses. Additionally, organisations can boost content creation by expanding text with minimal input, simplifying knowledge management. The Suggested Knowledge Articles feature uses text matching to direct customers and agents to helpful resources, and Content Cues analyse and suggest updates for your knowledge base articles based on their effectiveness.

Our Zendesk AI solutions have already demonstrated significant value to our customers, saving an estimated 35 years of staffing time. Moreover, 90% of Zendesk customers who have adopted generative AI tools report a positive ROI and agents using Zendesk are 2.7 times more likely to express satisfaction with these AI tools.

Zendesk's commitment to advancing AI in customer experience is unwavering and, over the course of 2024, we'll be unveiling powerful new features. By choosing Zendesk, businesses can ensure they're not just keeping pace but setting the pace in delivering exceptional self-service experiences.

Methodology

CX Trends findings highlighted in this report come from three sources: a global survey of 2,500 consumers across 20 countries, a second global survey of nearly 4,500 business respondents (including 1,500 business respondents and 1,000 consumers in the EMEA region) and Zendesk Benchmark product usage data from more than 99,000 participating companies.



To find out more about how to get the most out of self-service with AI, contact Zendesk today.

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