

CUSTOMER SUPPORT AUTOMATION

EVALUATION CHECKLIST

If you are new to automation, this checklist will help you make sure you evaluate new tools against your own customer support workflows to see how they stack up. The checklist is broken down into several sections: Common Support Goals, Workflows and Integrations, Machine Learning, and Natural Language Processing.

COMMON SUPPORT GOALS

TRIAGE

- Can auto triage tickets by classification (level 1 / level 2)
- Can auto triage tickets and route to the right rep
- Can auto triage in other ways
- Can triage via:
 - Chat
 - Phone
 - Email
 - Other

CLOSING KNOWLEDGE GAPS

- Automatically identifies unanswered questions
- Automatically queues questions for the right person to answer
- Automatically suggests answers to match to unanswered questions

RESPONSE TIME (FIRST AND TOTAL)

- Lowers response time with auto-classification
- Lowers response time with auto-answering
- Lowers response time with suggested answers

REP PRODUCTIVITY

- Automates monotonous tasks for reps (how much?)
- Automates answering tickets, questions, and other inquiries
- Automates rep training

DEFLECTIONS

- Automates and resolves high frequency, low-touch questions without a human in the loop at a:
 - < 40% success rate
 - 40% - 60% success rate
 - > 60% success rate
- Automatically triages questions not answered by first touch to the correct rep or ticketing que

TIME TO FIRST TOUCH

- Lowers the average time it takes for first touch by more than 50%

HANDOFFS TO OTHER SYSTEMS

- Automates tasks by integrating with other systems (ex: JIRA, Zendesk, Salesforce)

REP RAMP TIME

- Decreases ramp time for new reps by 50%

LOWER COST PER RESOLUTION

- Decreases ticket volume by 40% due to more intelligent knowledge retrieval and automations

HOLD TIMES (FIRST CONTACT, FIRST TOUCH RESOLUTION)

- Decreases hold times through automated responses and intelligent triage

OMNICHANNEL

- Automatically updates or sync with other systems to have a single source of truth

WORKFLOWS AND INTEGRATIONS

SUBJECT MATTER EXPERT (SME) - REP

- Reps are notified of new answers and important content changes by Subject Matter Experts (SMEs).
- SMEs are assigned to unanswered questions
- SMEs are auto-suggested to administrator
- Tool learns to auto-route to appropriate SMEs

TICKETING

- Integrates with existing ticketing and support systems, for example:
 - Salesforce
 - JIRA
 - Zendesk
 - HubSpot
 - GitHub
 - Other?

- Are the following items automated?
 - Ticket creation
 - Ticket update
 - Closing a ticket
 - Routing a ticket
 - Drafting a ticket response

CHAT

- Integrates with your current chat system
- Offers a chat interface for internal support teams and external support cases

KNOWLEDGE BASE

- Integrates with your knowledge base (KB)
- Offers an import / export service for your KB content if necessary
- Provides automatic syncing
- Allows annotation and tagging for machine learning purposes

MACHINE LEARNING

Important Questions to Ask

- How frequently are machine learning models updated to incorporate new information?
- Do the updates happen automatically, at specified intervals, or only when manually triggered?
- Does the tool have the following functions:
 - Auto-Assignment (ability to predict who should respond to a ticket)?
 - Auto-Triage (ability to predict the priority of incoming and active tickets)?
 - Auto-Tag (ability to predict which tags and labels belong on a ticket)?
 - Smart Reply (ability to suggest responses to issues detected in a ticket)?

NATURAL LANGUAGE PROCESSING

Important Questions to Ask

Does the tool's Natural Language Processing have the following capabilities:

- Named Entity Recognition (ability to automatically detect, extract, and surface names of people, places, and other important things)?
- Automatic Glossary (ability to automatically detect, extract, and surface acronyms and their corresponding definitions)?
- Natural Language Understanding (ability to go beyond keyword search with deeper semantic awareness)?
- Question Answering (ability to retrieve precise answers from FAQs, applications, and unstructured content)?
- Content Reasoning (ability to recognize very similar content, cascading context)?