

5 steps to get started with AI for customer service

Are you looking to integrate AI into your customer service strategy? This checklist outlines five key steps you need to get started with AI for a smooth and successful implementation.

Identify opportunities

- Identify areas where AI can have maximum business impact, such as managing repetitive tasks and high-volume interactions
- Leverage AI to assist agents with real-time coaching, drafting responses, solving complex issues, and improving overall productivity

Evaluate security

- Work with your security team to ensure vendors use advanced data anonymization, PII masking, and strong encryption with regular audits
- Verify transparency in data handling and choose vendors who eliminate biases and prioritize ethical AI practices

Set benchmarks

- Identify metrics that will determine success for your organization, such as faster resolution times, improved CSAT, and increased agent productivity
- Align AI goals with these existing KPIs to measure success effectively

Test your AI project

- Update existing operations and drive enablement of agents on the new AI capabilities and functionalities, starting with a mix of experienced and new agents
- Gather feedback and refine your approach before a wider rollout

Expand

- Develop a phased rollout plan to implement AI across other customer service teams or use cases
- Provide training and support for confident AI adoption, ensuring a smooth transition and continuous performance improvements