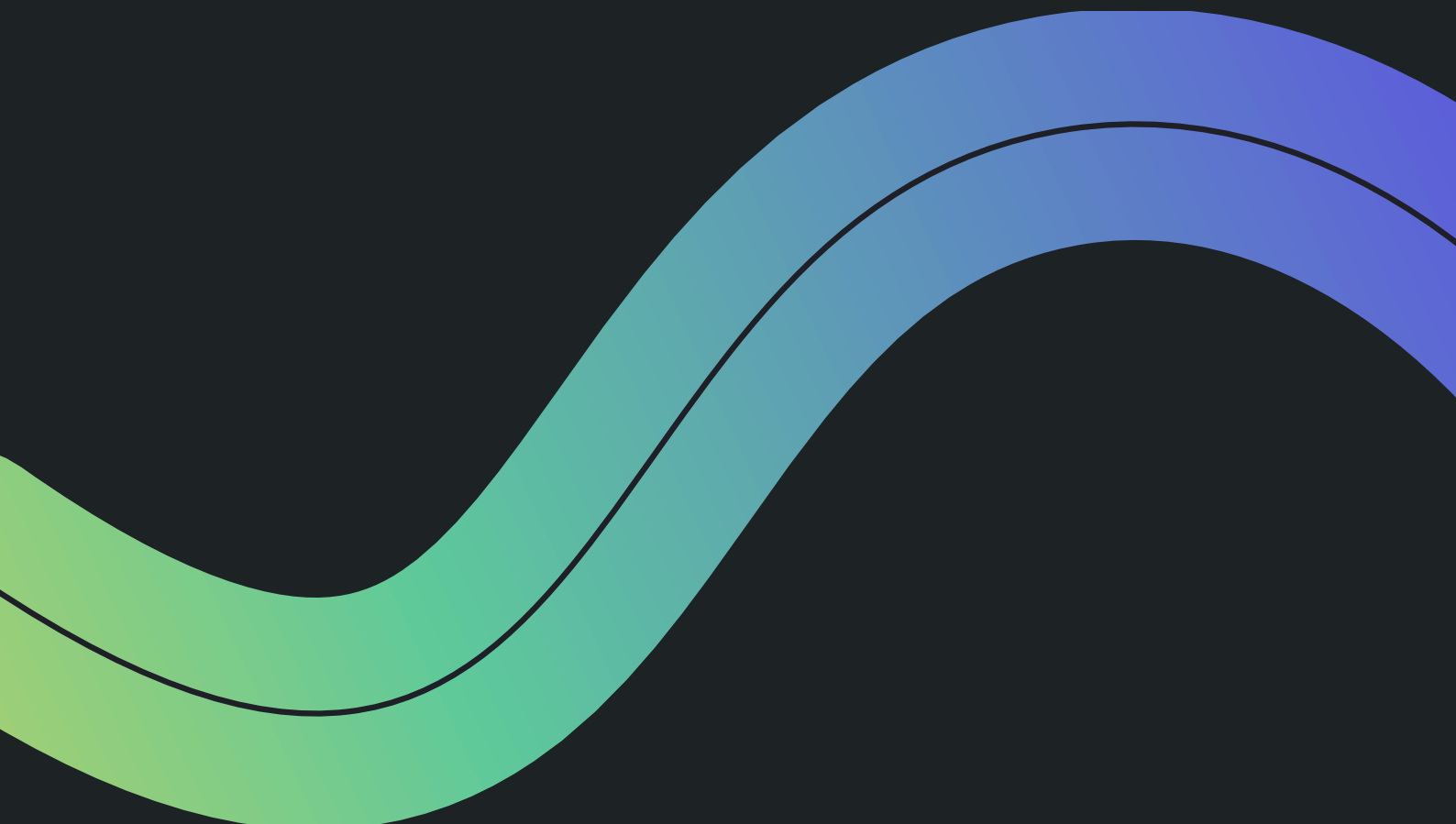


Getting started with automation:

# How to scale your support with AI

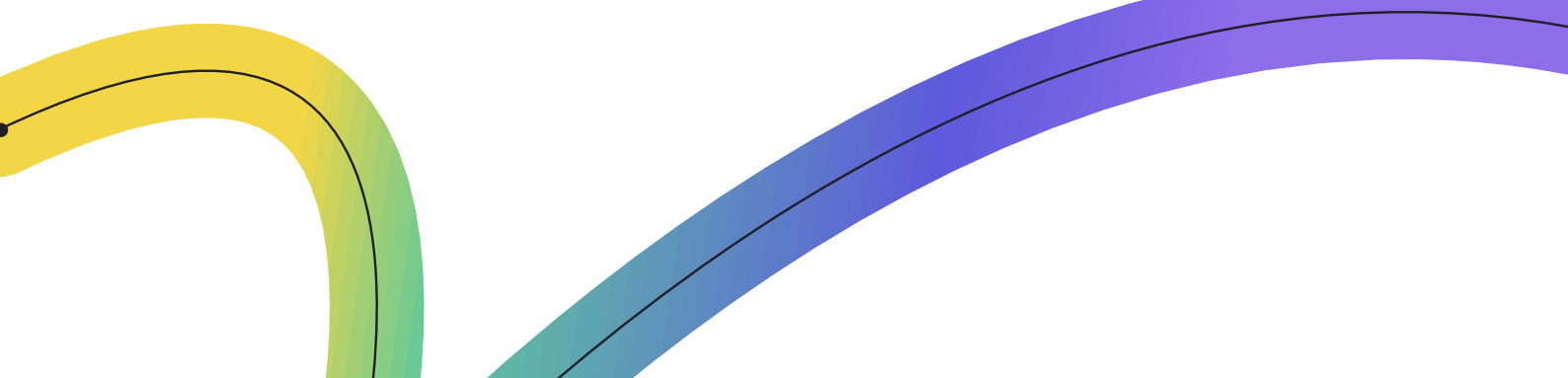
Ecommerce Edition



Ultimate.   helphouse

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# Letter from our Co-founder

Imagine an actual, physical market, where everyone is shouting and tugging at you to pull you toward their stall and show you their products. What that does is create tremendous pressure on you as a buyer. When under pressure, we let ourselves be pushed into decisions we might regret, fueled by 100% anxiety and 0% control.

The automation industry in 2022 is like that.

As support automation enters the early mainstream phase, new AI providers are flooding the market every day and pulling out all the stops to draw attention to themselves.

And they're onto something: The demand for automation in the customer support space is immense and growing. As exceptional customer experiences become growth drivers in their own right, automation keeps costs down, leaving your support team in charge even as volumes spike. That's why 79% of support leaders plan to invest in greater AI capabilities in the next two years.

But many businesses are still struggling to keep up with the trend. They know automation is a no-brainer for them, but aren't sure how or where to get started. Committing to a technology this new can be scary, and they're afraid of making risky investments. Many automation providers tap into that fear, selling their products as an instant cure-all, and boasting automation rates and go-live timelines that seem almost too good to be true (spoiler alert: They usually are).



The good news is that fierce competition drives quality. All you, as a buyer, have to do, is know how to separate the wheat from the chaff.

And that's what we at Ultimate are here to help you with.

We want to help you cut through the noise by explaining the foundations of automation and laying out a set of recommendations for your business that draws on years of expertise in a rapidly maturing industry.

In this guide, you'll find:

- A breakdown of the 4 most important KPIs
- 6 features to look for in a CS automation provider
- 7 concrete steps to scaling successfully with AI

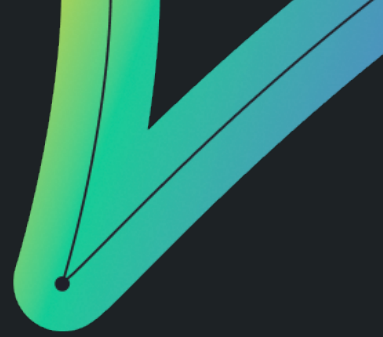
Knowledge is power; let's wield it to find the right tools for your needs.

Yours in joyful support,

A handwritten signature in black ink that reads "Sarah Al-Hussaini". The signature is written in a cursive, flowing style.

Sarah Al-Hussaini, COO & Co-founder

# The Ultimate glossary



## Artificial Intelligence (AI) model

An AI model is a program that has been trained on a set of data to recognize patterns. It can be continuously improved through training. The more data, the more patterns, the more accurate your AI. You can think of your AI model as your virtual agent's "brain".

## Bot handled rate / automation rate / resolution rate\*

The amount of fully automated, resolved, or "handled" conversations, out of all bot conversations in a chat.

## Conversation

A chat conversation is the sum of all messages exchanged between a customer service agent and a customer.

## Conversation design

An automated dialogue logic that a virtual agent can follow to solve requests. Conversation design is interactive, meaning the virtual agent can ask questions to then give personalized or highly specific replies based on your customers' answers.

## Deflection rate\*

The percentage of conversations that were not escalated to an agent.

## Escalation rate\*

The percentage of conversations that were successfully escalated to an agent, out of all conversations with your virtual agent.

## Expression

Expressions are customer messages that have been matched to what's called an intent by your AI. Examples of expressions include "Where is my order", or "When will my package arrive?"

## Intent

An intent is a group of expressions that all have the same purpose: They're a question your customer wants to know the answer to. A good AI model can group expressions and create intent categories instantly and automatically – so your agents don't have to! An example of an intent would be "Order status".

\* Exact metric designations may vary depending on your automation provider, and whether you're measuring chat or email/ticket conversations. The most important thing to remember is that you should have access to reliable data on the percentage of conversations that are being fully automated, deflected, or escalated relative to the total amount of conversations within any given timeframe.

## Integration

There are two types of integrations. The first is between your virtual agent solution and your CRM. The second is between your virtual agent solution and your backend (servers, applications, and databases). Integrations are a two-way street: Your virtual agent can pull information from your CRM or back office software, as well as update that information based on input from the customer.

## Message

A message is a part of a chat or email conversation. Several messages can make up one conversation. From “Good morning” to “I’d like to book a trip to Florida” – everything your customers or agents say to each other is considered a message.

## Natural Language Processing (NLP) and Natural Language Understanding (NLU)

Natural language processing (NLP) is a technology that helps computers read and understand natural human language. Natural language understanding (NLU) is a subcategory of NLP. Using NLU, an AI model can learn a language using examples. It can understand and group a range of sentence structures and spellings, including synonyms and typos. Automating with NLU means never restricting communication to a list of predefined keywords, reducing frustration and improving your automation rate through the AI’s high accuracy. This is useful both for automated chat and email ticketing.

## Ticket

A ticket is a documentation of any sort of interaction with your customer. Some customer service providers also refer to a ticket as a “case”. While it’s possible for a chat interaction to turn into a ticket, you’ll usually use the term when talking about email or social media messages.



## Ticket automation

NLU technology can help your virtual agent triage and answer your incoming messages, too. The first step is categorizing intents by applying tags or labels. Next, your tagged tickets can be routed to the correct agent or department. With the added help of CRM integrations, you can then update customer information, or trigger automated replies. One of the most common and easily automated intents? A password reset.

## Virtual agent

A virtual agent (VA) is not just a chatbot. It’s more like the agent behind the chat widget that you see in your browser. Its tasks can range from automatically fetching, routing, and labeling information to communicating with you directly via chat, messaging, or email.

Getting real:

# The 5 most common misconceptions about automation

The key to automation success lies in funneling your resources into the right tools, with the right goals. So to help you know what's right for you, we'll first take you through what's not. Here are the 5 most common misconceptions about automation – from over-hyping technology to under-educating buyers.

## 1. Automation will replace your human agents entirely

Automation will never displace your entire CS team. But it will reduce the cost and hassle of hiring and training to accommodate support peaks and troughs. This is especially valuable for businesses dealing with peak seasons, serving customers located outside their time zones, or offering support in several languages. All businesses benefit from less agent churn. And on the customer side, the combination of technological efficiency and human empathy will always remain key to a satisfying customer experience.

## 2. Automation will disrupt existing workflows and require additional resources to maintain

Not if you take the time to set up your team and tech for success: Invest in a provider with an interactive onboarding program, appoint a dedicated automation team, and learn from your historical support data.

## 3. When we talk about automation, we're only talking about chatbots

Chatbots dominate the conversation around automated customer support. But there are so many more ways in which automation can help your business scale, whether through routing and triaging emails,

*“70% of our email tickets are tagged automatically. Now our agents can focus on serving our customers better.”*

Ilaria Vilardi,  
Senior Operations Support Manager, Clue

fast and easy personalization through integrations, or robust analytics that let you closely track your key metrics and KPIs. Most importantly, you should prioritize the channels that your customers prefer. If most of them use email, it will make more sense to get started with ticket automation over chat.

*“Why not let a virtual agent handle the easy questions and save your agents' brain power for something challenging and fun?”*

Joyce Yang,  
Product Manager, Ultimate



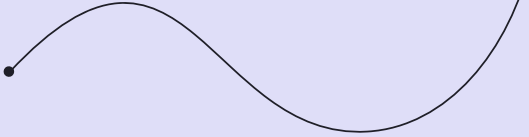


#### 4. Out-of-the box products are the best way to dip your toes into automation

When we're new to a product, the simplest setup may seem like the least scary option. But when scaling, it's best to opt for automation solutions tailored to your business, allowing you to use the features you need, when you need them. They can still be easy to implement using no-code technology.

#### 5. The higher the automation rate, the better

Gartner predicts that by 2024, virtual agents could automate up to 80% of call center agents' low-value and frequently repeatable tasks. But not all intents lend themselves to full automation: Think case-by-case decisions on how to handle a refund. However, there are still incredible benefits to partial automation. This is when your virtual agent collects, verifies, and updates information automatically before escalating. It's a reliable way to reduce both first response time (FRT) and average handle time (AHT) considerably.



*“You’ll have more success if you assemble the right team from day one. While it can be busy in those first days of implementation, the workload then quickly drops off and levels out, with resources saved in the long run far outweighing the cost of your initial setup.”*

Ben Dyer,  
Lead Customer Success Manager,  
Ultimate

# Your 4 KPIs for scaling successfully

The goals you want to achieve will vary immensely depending on your business size, the product or service on offer, and your existing workflows. In ecommerce, your automation strategy will revolve around reducing friction to drive conversion. And you'll be able to do that with a mix of proactive support and easy self-service automation.

## **Increasing customers served through 24/7, our outside office hours (OOH) support:**

Instant information is crucial for customers on the brink of a purchase, and 24/7 chat support is the best way to reduce any friction in their buying journey. Measurable knock-on effects of 24/7 support may include lower cart abandonment rates (think midnight shoppers with last minute questions), serving customers in different time zones than your support team, and reducing email backlogs outside your support office hours (OOH).

## **Expanding your market with multilingual capabilities:**

Reducing the need to hire in the respective languages you expand to is a way to reduce overhead costs, especially if your need for more languages increases while you continue to hire from the same core hub. With multilingual capacities, saving effort during training is another area where you'll see tangible results when comparing providers. Look for ways to manage, train, and track results for multiple languages from one place, rather than having to maintain one bot per language.

## **Establishing an automation rate of x%:**

In ecommerce, automation rates are on the high side because there are so many simple and repetitive requests that can be fully handled by a virtual agent or automated ticketing workflows. Evergreens include shipping requests and what industry insiders call WISMO (Where is my order?). As a rule of thumb, an automation rate of 40-60% is a great result. Add 10% for a realistic deflection rate.

## **Reducing average handle time (AHT) by x%:**

Not all requests lend themselves to full automation, and some will always require a human touch. But a virtual agent can collect and verify information upfront, reducing the time your human agents spend on a case. Likewise, intelligent ticket routing can reduce the amount of manual tasks your human agents need to perform on a given query. A typical example for this would be a damaged item request, where your virtual agent can determine the type of item and ask for an image upload, leaving it to your human staff to initiate the returns process and decide on next steps.



# 6 features to look for in a CS automation provider

## 1. A tool to analyze support data

Getting a solid, data-driven overview of your most common requests will help you figure out how much time you're saving and what to automate first.

## 2. No-code software

We recommended no-code automation software for customer support teams simply because it is more accessible. The person setting up and training your virtual agent will likely be an expert in customer experience, rather than a developer. Since no-code platforms are designed to be intuitive to use, non-technical users can master them easily, with no IT resources required.

*“Automating with a no-code platform has made it incredibly easy for us to get started.”*

Iveta Liaudanskaite,  
Senior CS Specialist, TransferGo

## 3. Support on your customers' preferred channels

Set clear expectations, goals, and strategies by deciding on KPIs. Then, map out existing workflows and prioritize which you'd like to improve. This will determine which products or channels to start with for most effective results.

## 4. Support in your customers' preferred language

Many AI-powered virtual agents can now be trained to understand what you're telling them, typos, commas and all. But the majority still rely on translation layers to serve customers in additional languages. Look for AI models that you can train in any language from scratch. This means higher AI accuracy, reducing frustration for customers.

## 5. Compliance with SOC 2 or GDPR

Vetting providers for data and cybersecurity can be a pain – and take ages. Luckily, there are standardized compliance frameworks such as GDPR in the EU, and SOC 2 in the US. Choosing a provider that's compliant with one or both will let you rest easy re: data collection and handling.

*“At the end of the day, you will want loyal customers, and the way to get there is through proactive customer service. And you need to use omnichannel support, especially messaging, to proactively anticipate your customer needs.”*

Matthias Kuhn,  
Head of Business Development, Ultimate

## Pricing 101

Automation is a tool to help businesses scale, so you can and should expect your needs to change over time. Your automation provider's pricing model needs to reflect that flexibility and include leeway for customization.

### × Don't

Go for a provider that only offers **monthly billing**. While it may be a viable option when just starting out, your pricing needs may change as your business continues to grow.

Pay per bot. You may end up paying for an additional virtual agent for each channel or language served as you scale across channels and markets.

Settle for a plan that's unclear about gated features, like rich messaging or integrations. (Consult [your KPIs](#) to map out what should be included in your plan.)

Buy into a "set it and forget it" narrative. Automation is a game changer for your company – if done right. Without the proper onboarding to your technology, you risk wasting its potential – and your valuable resources.

### ✓ Do

Know your terms and metrics before going into pricing negotiations. 15 cents per message will cost you much more than 15 cents per conversation. Do you remember the difference between the two? If not, check our [Glossary](#).

Pick an automation provider offering a broad range of products, so you don't have to buy additional software from a different provider. For example, if you think you'll need chat for now, and tickets a few months down the line, look for providers offering both because you might get a customized combination price.

Invest in an onboarding plan, or "bootcamp." It will pay dividends once your solution is up and running, allowing your CS team to take 100% ownership of your virtual agent. See our "Getting Started" section ("How to set your team up for success") for more details.

## 6. A proven track record of success: reviews and customer stories

You vet all of your human candidates, so why not make sure your potential AI provider has a proven track record of success? Sites like [G2](#), the leading tech review platform where verified users share feedback on software solutions, are a great place to start. Customer stories are another way to see past accomplishments in numbers. They can also provide insights into how your provider approaches the onboarding process and whether your overall values align.

*"When choosing an automation provider, we wanted to avoid hidden costs."*

Sofie Werner,  
Automation Manager, Purelei

# Best practices for scaling your support

## Purelei x Ultimate

### Low hanging fruit: Deflecting FAQ-type intents with automation

By identifying their customers' most commonly asked questions based on their historic support data, e-commerce jeweler Purelei easily deflected 50% of their intents within 3 weeks of launching chat automation.

For more complex requests, Purelei uses partial automation to assist their human agents and speed up AHT. For intents like "wrong" or "missing item", their virtual agent collects the order number, name, and images of the item up front, then escalates to a human agent. This has cut down full resolution times by up to 50%.

### Personalized customer experiences with multilingual capabilities and a CRM integration

Purelei's virtual agent uses a CRM integration with Zendesk to deploy a different language depending on which country customers are writing in from based on their URL address. The virtual agent then chats with customers in German, Italian, English, or French to personalize their customer experience.

*"We just want to be as close to the customer as possible, whether it's the agent or the bot."*

Sophie Werner,  
CS Automation Manager, Purelei

## Papier x Ultimate

### Increased availability and successful expansion to new markets, thanks to 24/7 chat support

UK-based stationery company Papier was able to successfully expand their business from the UK to the US by providing OOH support through their virtual agent, so it could serve customers in US time zones while Papier's human support staff remained based in the UK. 24/7 chat also ensured a smooth scaling process despite seasonal upticks during the holiday and wedding peak seasons.

In addition, Papier's virtual agent reduced resolution times through a backend office integration with Sorted, Papier's delivery experience platform. Their virtual agent can now fetch information like tracking numbers and shipping status from Sorted in real time, and pass it on to their customers 24/7.

## About You x helphouse.io

With helphouse.io's guidance, the customer service team at ABOUTYOU was able to handle their growing customer service set-up and continue to provide a great customer experience. The team managed to reduce their average handling time by 27% while increasing the CSAT by an impressive 7%.

# The benefits of working with CX experts

## Experts have an eye on the big picture

State-of-the-art customer support tools are made to scale your business intelligently and improve your support, but they're only one part of your broader customer experience. CX experts will keep an eye on how your customer service infrastructure fits into that experience, so you can rest easy and focus on other tasks – like training and optimizing your virtual agent.

## Experts know which tools you should use – and how to use them

Thanks to conversational AI, customer service lets you meet your customers wherever they are. Not only can you employ an omnichannel approach to make communication frictionless, but you can also use analytics to determine where your customer is most likely to engage with you.

Experts will thoroughly analyze your existing landscape and test it in every way possible in order to determine if there are any loopholes or pain points that need to be addressed immediately. Not only do they know the tools that can be implemented in your organization, but they will go the extra mile to implement those solutions for you so, providing guidance throughout your entire automation journey.



*“The experts at helphouse.io looked at our set-up from a different angle and through their highly trained eyes, which brought forward some interesting topics to consider. Their analysis and suggested solutions showed they understand our business and our needs”*

Povilas Čiuplys,  
Chief Customer Officer, Transfer Go

# The 7 steps to getting started



## 1. Educate yourself

If you're reading this ebook, that means you already are! Knowing how conversational AI works and which solutions are out there is the first step to choosing the right one to meet your needs. Additional places to look include [Gartner](#) or [Deloitte's](#) regularly published reports on automation, or the [CSA](#).



## 2. Design and align on your goals

Set clear expectations, goals, and strategies by deciding on KPIs. Then, map out existing workflows and prioritize which you'd like to improve. This will determine which products or channels to start with for most effective results.



## 3. Obtain your main customer pain points

Many automation providers offer tools to discover your most popular customer intents. Testing them on your unique support data is a win-win for you: If you already have an idea of your top intents and their tool confirms that result, you know the AI is good. If you end up finding additional intents, then you have an even more precise idea of what to automate first. We usually offer this in the first stages of our onboarding process or allow our customers to self-serve using our free [CS Automation Explorer](#).



## 4. Set up your team for success

We advise assigning a project lead, a bot builder, and a CRM expert to get started. As with all things automation, your mileage may vary, but we recommend having 2-3 team members spend about 5 hours per week on your initial setup.



## 5. Set up your existing technology for success

Look for automation providers that can seamlessly integrate into your existing tech stack, including your CRM and backend. Then, make sure to figure out if you'd need to factor in additional IT support to install backend integrations.



## 6. Prep for launch success

Before your official launch, it's time to put your new virtual agent to the test and throw everything at it! For example, at Ultimate, we usually guide customers through a 'break-the-bot' session to test their AI's performance and improve chat conversation flows.



## 7. Achieve long-term success

Now's the time to monitor and iterate, and assess your performance against your KPIs. Raise your automation rate by training your AI and expanding the number of automated intents. Then, think about a long-term growth strategy with added KPIs around 24/7 support, additional languages or channels.

*“Make the virtual agent a member of your team. Don't think of it as external software that you need to get the hang of, but a tool that you can teach to follow your processes.”*

Maeve Condell,  
Customer Success Lead, Ultimate



# About Us



## Ultimate.

We're 5 years into our mission of building the world's most powerful virtual agent platform and we're growing fast, with 150 team members today across Europe and North America.

Our incredible customers — from Finnair to Vodafone, TransferGo to Gorillas — have voted us #1 on G2, the world's largest tech marketplace. And we've held that top spot every quarter since the category was founded over a year ago.

So if you want to get started and scale support with automation, you're in safe hands.

A holistic and instantly-integrated automation solution, Ultimate offers so much more than just chatbots.

We're talking:

- 24/7 support
- Chat & ticket automation
- Multilingual support (yes, in up to 109 languages!)

The result? A customer experience that drives growth, solves problems and enables efficiencies. So your human agents can focus on rewarding tasks, not repetitive ones. And so your business can scale better and faster than ever before, with the help of AI.

Because your success is our success.

## helphouse

helphouse.io is a full-service Customer Experience consulting firm with solid experience in optimizing the digital customer service for some of the largest brands in Europe.

We offer our clients a holistic solution that encompasses all the facets of a successful customer service operation.

We can solve critical problems for our clients. Simply put, we are experts in optimising the digital customer service for ambitious companies, and we provide them with a fully functioning and personalised Zendesk system that reaches out to a broad audience.

Contact automation experts →

Contact CX experts →

Find your automation potential →