

# A Strategic Approach to Intelligent Automation in B2B Technology Support

## Executive Summary

Support issues for technology products frequently require complex solutions that customers want completed quickly. There's a lot at stake, because a customer calling about a problem could represent millions of dollars in revenue. Intelligent automation can significantly reduce cost per case and time to resolution, but to gain the full benefit of AI, organizations need to move beyond break-fix point solutions to take a more strategic approach.

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When an enterprise technology customer faces an issue that requires support, the problems often require multiple actions and interactions to solve. After all, most B2B technology systems are part of a large stack that is interconnected with many other systems from many different vendors. This complexity makes identifying the issue difficult; resolving a case may require multiple calls, emails and other touchpoints over days or even weeks.

These multiple touchpoints often make the situation even more difficult for the highly skilled professionals charged with solving customer problems, because many technology companies struggle to track what different customer support team members have done, along with the interactions the customer may have also had with self-service tools.

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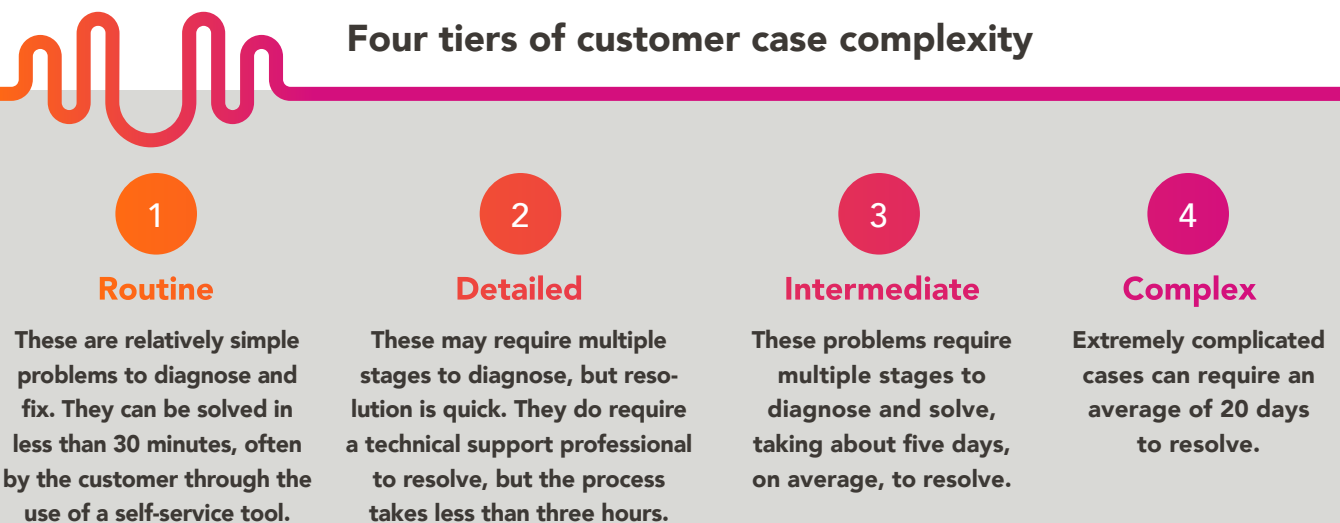
## From Break-Fix to a Strategic Approach

Technology companies need to resolve these cases quickly and efficiently to ensure customer retention, increase customer satisfaction, and reduce costs. The industry is moving towards the adoption of solutions that employ artificial intelligence (AI), machine learning (ML) and analytics but there's no one-size-fits-all solution. Every organization has unique challenges and needs. AI automation can be used to improve time to resolution and lower cost per case, but its application must be strategic. And before the organization can determine a strategy, it must first know the challenges it faces and the goals it's trying to achieve.

Customer support organizations within technology companies have to move beyond a break-fix approach to think strategically. It's important to capture data across the customer support journey and correlate it with revenue and loyalty metrics for proactive risk management. To understand how the customer experience affects renewal, identify the pain points, and determine which ones can be solved first, it's necessary to conduct an audit of cases to understand what the low-hanging fruit is—where can the organization make the biggest gains in the shortest amount of time?

In terms of complexity and time to resolution, customer cases break down into four basic tiers: routine, detailed, intermediate, and complex cases (see graphic below).

### Four tiers of customer case complexity



Are team members spending time on a high number of routine cases? If so, then the implementation of AI automation to power higher quality self-service tools is a relatively easy way to lower costs and free up resources for more complex cases.

## Applying AI Automation to Complex Cases

Long-term, however, the biggest gains arise from addressing the challenges of more complex cases. The good news is that, generally speaking, the more time team members spend solving a problem, the more AI automation can help.

Are team members facing difficulty identifying the customer's intent and problem? Spending time going over the case with the customer to gather information and understand what other team members have already done? Struggling to find the technical information and documentation they need to solve complex problems?

the cost of providing customer service for an enterprise technology company. Currently, only 9% of customer service issues are resolved through self-service. Increasing this percentage not only improves customer satisfaction, it also saves the vendor potentially millions of dollars in costs — while giving the customer support team more time to devote to resolving the most difficult cases.

### Caller intent

Determining the true nature of the problem that the customer is bringing to customer support is a complex task. These highly skilled professionals need to be able to rapidly understand callers' intent, which customers may not always explicitly express. For instance, a major retailer may call about an issue with a specific database

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Each of these questions has a different answer when it comes to the specific AI-powered solution that applies. Once the team chooses that initial solution, they need a common system of intelligence that connects myriad systems and powers multiple use cases. Again, this is not a destination, but a journey of continuous improvement. The organization doesn't want to end up with a collection of disconnected point solutions, because they won't get the full value from AI.

With a common system of intelligence, information from one use case can inform AI on others. This enables it to apply the full scope of customer data so it can continuously learn and improve its ability to drive the organization towards faster, more accurate solutions. The goal is to move from reactive technical support operations to proactive ones that reduce friction and provide AI assistance to speed resolution and reduce cost per case.

## Intelligent Automation Use Cases

There are many use cases for AI automation in customer support at B2B technology companies. Here are some of them:

### Self-service via a virtual agent

Robust, effective, AI-powered self-service options such as virtual agents can make an enormous difference in

query that is running too slowly. However, the customer is actually experiencing slow performance across the board, which turns out to be a networking problem rather than a server one. Discerning the context and the customer's true intent is vital to achieving a satisfactory resolution.

One of the key components to understanding intent is to first understand what's happened before. The multiple communications channels for reaching the support team are often fractured. Email, chat, social media, phone and self-service all collect information that's rarely available in a central location.

Conversational AI and intelligent automation can bring together information from multiple channels to provide team members with a comprehensive view of the customer journey. Customers will not need to explain their issues over and over again, and team members can hit the ground running.

But conversational AI does more than remove barriers between information streams. It also assimilates customer data and surfaces relevant information for team members, eliminating the stress and delays caused by digging for information while customers wait. The AI can even provide guidance to help identify the real issue faster so troubleshooting can begin. And during troubleshooting, again, the AI can provide suggestions and guidance, drawing on similar past cases. Over time, the AI's guidance will improve.



### Problem resolution

Once the problem is properly classified, enterprise technology support professionals must work to find a solution as efficiently as possible, because customer expectations are high. The knowledge they require may be contained within technical documents, and they will also need to review case logs, notes of prior conversations, emails, and interactions with self-service tools to fully understand what's previously been tried.

AI automation can bring all of this together, surfacing the most relevant content for the problem at hand so that these highly skilled individuals can put all their talent to bear on solving the problem and not searching for relevant information.

### Notes and promise management

Conversational AI can also enable promise management and handle after-call actions more efficiently and accurately. AI can automatically recognize and log promises team members make during live customer interactions, such as adding promotional credits to a bill, ordering parts, or scheduling a service call. After review, the AI can send a summary of these commitments to the customer and manage their fulfillment.

### AI and Support Team Retention

With millions of dollars potentially at stake and so many different factors to deal with, enterprise technology customer support is often a stressful, complex, and high-pressured job. As a result, retaining these highly skilled professionals can be difficult and expensive.

According to [McKinsey](#), losing a customer care team member costs \$10,000 to \$20,000 per person. Training is also costly, with McKinsey calculating the cost of four to eight weeks of instruction totaling up to \$80,000. And as critical as good training is, that's time that isn't being spent helping customers.

AI automation provides team members with a better experience. They're far less stressed, because AI is gathering information, analyzing similar cases to point to potential causes and resolutions, and surfacing the right technical documentation. Plus, they no longer need to worry about taking notes or spending time after the call summarizing the commitments they made. The conversational AI will have noted and summarized all promises, and the information conveyed during the call will be available for any future team members who need it. It makes each team member far more productive, with shorter time to resolution.

This all translates into higher morale and better retention. After experiencing the lower stress, higher success environment enabled by conversational AI, the prospect of going to another company where things are done without AI assistance will look considerably less appealing.

Uniphore has deep experience helping customer support organizations develop an AI strategy and in providing AI-powered solutions, including [U-Assist](#), which automates commitment summaries and management, and guides team members with relevant information; and [U-Self Serve](#), an intelligent virtual assistant that delivers a human-like experience, simulating human conversations and delivering frictionless experiences in multiple channels, including text, chat and voice.

Enterprise technology customer service team members face serious challenges providing support for technology products and services. By developing a comprehensive strategy that starts with the use cases of the most obtainable gains, organizations can build on a common intelligence platform to add use cases and continually improve customer satisfaction and reduce costs.

➔ **Watch this webinar** to learn more about how Conversational AI and Automation helps your organization provide better technical support.

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