



# AI Driven Customer Experience

From Metric Driven To Consultative: The  
New Path Forward



## Introduction And Overview

# Support Is Evolving Top Leaders In CX Share How

AI is creating a mindset shift across CX teams, one where retention doesn't just belong to one department--it belongs to all.

# 38%

of leaders see improving customer experience and retention as the primary purpose of initiatives to deploy applications trained on large language models.

# Gartner®

We've just wrapped up on one of the most transformative years in Customer Support. So, it only made sense to revisit discussions with industry frontrunners who have embraced AI to deliver exceptional customer experience.

**This guide illuminates the potential AI holds for Support, Success, and retention across the broader spectrum of management, product, and engineering alignment.**

2023's AI revolution - fueled by Generative AI - is a major step up from anything that came before. While the previous era succeeded in using quantitative data from product usage, language models weren't as widely known. GenAI changed that. For the first time, language models were adopted and deployed company wide to comprehend and respond to knowledge workers after having ingested large volumes of textual data from customers and product.

Transformative events such as these are opportunities for everyone. Small companies get to leverage enterprise grade technology that allows them to deliver exceptional experiences without breaking the bank. Large companies achieve efficiency gains by predicting and summarizing customer issues while breaking down data & dept silos.

**"AI is serving as a forcing function to evolve Support teams from metric driven to being more consultative. We can't just resolve issues "faster" anymore. Teams need to validate, 'Did this improve our customer's experience? Did we actually help our customers get value?'"**



**Somya Kapoor**  
Co Founder & CEO  
of TheLoops



# What else is changing?

Support is evolving from beating the clock to becoming more consultative. To aid in this quest, CX teams no longer need multiple point solutions to improve agent productivity and reduce customer friction. In fact, reliance on a multi-stack, point solution approach created the very data silos and manual processes which AI is steadfastly replacing.

## The era of innovation is here.

Our aim with this guide is to shift your thinking and adoption of AI from a single solution, metric focused mindset to that of AI driving retention across every internal CX touch point.

To help leaders evolve and lean into this mindset shift, we hosted a monthly fireside chat series. This guide isn't just a summary of **600 minutes** of insight-dense conversations with high-caliber CX leaders. We look at it as insights derived from those managing millions of agent hours and billions of support tickets, summarized into multiple pages of high-impact and actionable insights.

Use this information as your Copilot in learning and evaluating how the AI and Support of the past is quite different from the necessary AI and CX of today.



“Using time based metrics are great for an Eagle-eye view, but using them to gauge agent efficiency or satisfaction can very easily lead to those same agents feeling pressure to just clear a queue. Instead of making time to reply your focus, first touch resolution (meaning tickets resolved effectively with one reply) should be the gold standard.”



**Sarah Hatter**  
Senior Director of  
Community & Events  
ElevateCX | PartnerHero

# Decoding AI Action Is Essential



**Rick Nucci,**

Co-Founder & CEO of Guru,

did well to outline key challenges facing CX leadership as they evaluate AI via a post on his LinkedIn profile.

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“AI is shaping the future of customer experience and creating new opportunities for CX teams everywhere. There are also new challenges emerging for leaders preparing for an AI-enabled future.”

Here are four prevalent themes CX leaders are juggling at once:

 **Managing AI mandates from leadership**

 **Facing growing fears about AI**

 **Dealing with AI's trust issues**

 **Navigating an endless number of AI options**

Regardless, one theme also remains clear: CX teams and leaders who deploy AI-driven CX operations today will surpass their competition. Research from the National Bureau of Economic Research conveyed AI's impact on agent performance alone. When an agent with just two months' tenure used AI, they performed as well as an agent with six months' experience working without AI.



[www.getguru.com](http://www.getguru.com)



[ricknucci](https://www.linkedin.com/in/ricknucci)

# Doing More **With Less**

Phase One Was Self-Service. Phase Two Is Centered On Efficiency

## How AI Has **Evolved in CX**



Self Service



Conversation AI  
for end user



AI for Agents



Agent Auto pilot



Data Intelligence &  
Operational Automation



Managers Operational  
Insights

2023 was also a year of budget cuts and doing more with less. This will continue to be the norm in 2024. That said, apart from offering AI in self-service, support departments must achieve operational efficiencies by bringing AI in to help agents and by understanding each and every support interaction. Product, Engineering and leadership also need a real-time view on case insights. Even with fewer resources, streamlined processes and newfound productivity will ensure a top-notch customer experience across teams to help meet growing demands.



**Santosh Addanki,**  
Senior Director AI & Platforms,  
PayPal

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“With AI, we now feed post-contact information to the right places upstream to fix our product experiences and prevent these contacts in the first place. The benefits are reduced OPEX, increased customer satisfaction, and reducing customer churn.”

# Real-Time Actionable Insights

Retain Customers With Better And More Personalized Experiences

For the longest time, support was reactive because the tools to process large amounts of data in real time didn't quite exist. However, advancements in AI over the past couple of years have begun nudging teams toward being proactive and predictive.

“The plethora of data collected by SaaS companies is often only accessible to a few people. Most Support, Product and Success teams often do not have access to real-time data which could help them drive better experiences.”



**Craig Stoss,**  
Director of CX  
Transformation Delivery at  
PartnerHero



Wouldn't it be nice if your support could show up right before a customer gets frustrated or gives up? How would that play out for Success in retaining a customer who was suffering in silence? Customer churn metrics are typically lagging indicators; the customer is long gone before you can do anything.



**Genady Rashkovan,**  
Vice President of  
Global Support at Tricentis



“Acting on visible escalations is important, but it's equally crucial to address the challenges of customers who don't vocalize their issues. These customers may never escalate or voice their concerns, and without AI tools that provide insights into their experiences, their issues may remain undetected and unresolved.”

These are several reasons why AI adoption isn't optional. Your customers are beginning to experience AI-driven efficiency across various stages of the product experience; they are bound to expect the same with support. And then there's the fact that you're leaving valuable data to gather dust as it lay abandoned in your system. Support tickets are a gold mine.



When harnessed correctly, real-time AI-driven support delivers dynamic context to support agents, empowering them to make better decisions, requiring less intervention from management while delivering magical experiences.



**Matt Dunn,**  
Senior Director - Technical  
Success at Sauce Labs

“

Support tickets contain a plethora of signals that go beyond customer satisfaction. They provide valuable insights into trends related to the adoption of new product features, emerging problems, and patterns of usage across different areas of our products.”



**Camille Emefa Acey,**  
Advisor at TheLoops

“

Context is the gap between delivering support and creating exceptional experiences. Bridge the context gap between support and the customer, between support and engineering, and other functional areas. Now, think of all of this as a system that works 24/7 ingesting data and delivering insights to people who need it. I think it feels like magic, doesn't it?”

They say that any sufficiently advanced technology is indistinguishable from magic. Here at TheLoops, we're making context a default so that you always get the bigger picture.



**Adrian Brady-Cesana,**  
Founder and Chief Experience Officer,  
CXChronicles

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Within the next five years, it will become commonplace for SMBs to easily identify the top things customers love, dislike, want more of, or want less of. These Voice of the Customer insights empower businesses to make informed decisions in managing customer relationships, engaging prospects, and setting expectations for future customers.”

The dream of every CX leader is for their team to deliver personalized, relevant support, every time. To do so requires empathetic agents who can function at 100% efficiency while juggling multiple actions. Not to mention, strategically navigating and overcoming challenging customer scenarios.

Unfortunately, this is an impossible ask without the help of AI. Even the most enthusiastic and experienced support agents find that addressing each support request, particularly complex issues, can drain their mental energies. **Factors that contribute to inefficient, costly support include:**



### Reactive understanding of the customer's problem

- Without AI-driven insights, multiple back and forth messages are required to uncover the customer's issue
- Agents proceed chat, at which point, the customer is frustrated



### Gathering additional information to establish context

- Tracking case drivers without AI requires error laden manual tagging
- Reading through previous support requests is time consuming
- Asking follow-up questions forces the customer to repeat themselves



### Identifying solutions on the spot

- Agents scramble to review product and knowledge documentation
- Empathy may take a back seat to discovery and info gathering
- Resolutions follow a "gut feeling" approach based on past experience



### Issue resolution = data entry and admin

- Without AI, how do you monitor communication quality with customers?
- Time is lost tagging, summarizing etc
- Workflows are missing to automate the notification to engineering of escalation issues

Do any of the boxes above sound familiar? Many Support orgs are functioning this way today. At each step, agents are required to juggle multiple tasks eating away at their efficiency. Engineering is still logging into ticketing software. Then there's the added pressure of needing to manage the customer across their journey while dealing with data silos across point solutions.

# Agent Efficiency Is A Must For Every Company

At TheLoops, we've dug deep into solving this conundrum for support teams as well as managers and leadership. At the agent level, we've introduced dynamic recommendations, case summarizations and a reasoning engine that shoulders the workload in real-time. Bringing contextual information from multiple sources in the same window allows agents to minimize shifting between widgets and discovery mode-- combining multiple information sources to get a richer, relevant view of the problem.



**Greg Giletto**, Head of Customer & Product Support- Global, Bloomreach

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“Agents need real-time insights about the customer - sentiment, product usage, academy content consumed, etc. Implementing TheLoops gives our agents rich information and recommendations so that they troubleshoot, resolve, escalate, and re-route much quicker. No more jumping across tools and searching in disparate places.”

With AI-driven CX as a replacement, we help managers trigger workflows that automatically distribute case resolutions, streamline escalation management and standardize processes CX wide. Agent performance, customer trends+more are available via our managerial UI.

An added bonus of AI is the ability to streamline processes across your entire team. Think about the amount of manual errors and vulnerability not to mention human bias hindering your Support and data quality around product insights, QA, customer health and more.



**Hosam Hassan**, Director of CXT Strategy, PartnerHero

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“It's a nightmare when agents create their own processes on the fly. At scale, it's chaos. The key to making a Support team more efficient is using AI to create a single, predefined automated workflow - for knowledge, resolutions and process.”

Monika Aufdermauer, VP of User Success at KOHO, is also a strong advocate for consolidating tools and using AI to improve CX operations including data quality. KOHO uses AI to uncover case insights in real-time, QA 100% of Support interactions and to collaborate with their Product team using data-backed insights and tangible proof.



**Monika Aufdermauer,**  
VP of User Success ,  
KOHO

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“Since I started utilizing conversational AI years ago for support, I’ve consistently looked at how we can utilize AI to improve quality and efficiency. TheLoops lets me QA my AI with AI. The insights that we are getting are amazing and I’m always excited to talk more about how we are ensuring quality while utilizing the latest AI technology.”

What else should you know? If you’re not going to have any contextualization, it’s garbage, in garbage out. You want AI that understands and maps to a common data model, we call it a CX data model. Today’s AI needs to understand business logic, customer data, ticket data, usage, logs, alerts+more.

If you’re still questioning AI, think back to the adoption of the cloud. It wasn’t too long before skeptics soon faced their fate. What’s also vital to note: moving away from standard metrics to AI-driven, consultative support is finally going to give you a seat at the table. More on that in our next section.





Even though Support is always the first to know when things go wrong with a product at the front lines, that doesn't guarantee an automatic seat at the table with the C-Suite. While product roadmaps should be shaped by customer input, rarely do these inputs draw from the vast treasure trove of support interactions to shift change in real-time.

That's not to say that Support can't change their view as a cost center--this fork in the road is prime time to drive change. AI is now fueling Support with the ability to move away from surface level reporting metrics towards much deeper dives and data correlated to business outcomes.

***How do you get there? You can't settle for discovery from a few conversations when there are several orders of magnitude in customer conversations--you need to think beyond CSAT.***



**Ben Saitz,**  
Chief Customer Officer at  
Netskope

***“Support has always aspired to have a seat at the table. But I think the question is, what would we do if we had that seat? We have a lot of data and are in touch with customers more than anybody else in the company. Unfortunately, the insights have been locked inside an impenetrable vault. AI is the master key. With AI, you can now walk into conversations with engineering, sales, or product, and deliver value to each of those functions.”***

AI helps separate the signal from the noise. The synthesis of millions of support conversations should inform Success, Product, Engineering teams and even, your CFO. Not only will you get that permanent seat at the table, you get to be a part of the movement in further cementing the value of CX.

# New Year **New Focus:** Diving Deeper Into Data

In his recent post on LinkedIn, Support Leader Emre Tekoglu spoke of “The Paradox of Plenty: Why Customer Support Leaders Are Sitting on Gold and Not Mining It.” To one extent, processes and habits have forced leaders to stay stuck on operational metrics.

Emre elaborated further: “You might feel stuck in the comfort of familiar metrics, but blind to the vast landscape of possibilities. Kind of hard to make those observations.

So, let’s shift our focus, challenge ourselves, and re-imagine what’s possible. Because when we harness the power of data, we’re not just solving problems – we’re unlocking opportunities, shaping the future, and delivering unparalleled value.”

## You No Longer Need To Wait Weeks Or Months For Customer Data



**Emre Tekoglu**

Vice President, Customer Support at  
Zywave

“

**It's high time we delve deeper, challenge the norms, and harness the full power of the data at our disposal. Because beyond the simple metrics lie insights waiting to transform customer experiences, drive business growth, and unlock untapped potential.**

With AI deployed and running contextualized analysis on customer scores, sentiment and revenue at risk, Support now has an opportunity to articulate their impact on upsells, cross-sells and retention.

In their recent report on AI, Bain & Company emphasizes, “Artificial intelligence is as much an economic revolution as a technological one.” CX teams and leaders who deploy AI-driven CX operations today will stay ahead of, if not surpass, their competition both in part to productivity gains and the monetary impact of real-time, actionable data leading to immediate product and process improvements.

# A Unified Vision Is Possible

Support Insights **Are Beneficial For Success, Product+Engineering**

As we wind this guide down, we want to paint a picture for you. At present, your day likely begins with pouring over metrics in a BI dashboard, system of record or Google sheet.

You have this in place to give you a 30,000-foot view. It tries to serve as a unifying layer for all the information you need, (CSAT, MTTR, etc) scraped together by manual work. It's there to help you take action, validate Support and make informed decisions.

But does it truly help you or your company understand every customer touch point, sentiment or stuck point?

Conversely, agents on your team are also performing actions and making decisions each time they interact with customers. Except, they don't do it from a position of customer centricity. Valuable information about customers is spread across tools and teams that operate in silos.

Customer success has their own licenses to your support tools. Product postpones your requests as they need more data. Engineering is copying and pasting customer issues into the tools they use to manage backlog.

**None of this has to be.**

TheLoops gives you all a unified view of the customer by connecting multiple data sources. We contextualize your CX Ops with data from all your tools: Support, CRM, Success, collaboration.

As part of our ongoing mission to be a resource for CX teams, we're continuing our Fireside Chat series this year. We're here to help you implement what you can, as you can.

As you evaluate your AI path forward, we're here to answer your questions and help you embrace opportunity.

**"Delivering real-time, actionable insights. This is what TheLoops does - Ingesting customer and product data to drive efficiency in operations, provide relevant and accurate support while improving productivity."**



**Ravi Bulusu**  
Co-Founder & CTO  
of TheLoops



# Acknowledgements

This tome of wisdom wouldn't be possible without the contributions of Craig Stoss, Matt Dunn, Camille Emefa Acey, Genady Rashkovan, Greg Giletto, Hosam Hassan, Adrian Brady-Cesana, Santosh Addanki, and Ben Saitz. Their willingness to share their perspectives has been invaluable and serves as a testament to the collective wisdom within the CX community.

We're grateful to Rick Nucci for permitting us to borrow from his insights shared at the CS Lab Workshop and conveyed on LinkedIn. Thank you to Monika Aufdermauer, Emre Tekoglu and Sarah Hatter for your contributions as well.

To TheLoops family, your dedication has brought us far and continues to propel us forward as we co-create the definitive product for CX teams.

Lastly, we extend our heartfelt appreciation to you, our Support and CX Superheros. Your commitment to enhancing Customer Experience through AI, your appetite for knowledge and growth, and your contribution to our learnings are what motivate us to create resources like this guide. Together, we are building more profound customer connections in this AI-driven future.





# Explore Our Resources



## The Three T's of Ticketing

**Craig Stoss,**

Director of CX  
Transformation Delivery at  
PartnerHero



## Bridging The Data Gap: Aligning Support & Success, No Data Resource Required

**Camille Emefa Acey,**  
Advisor at TheLoops



## Understanding RO-AI

**Ben Saitz**

Chief Customer Officer at  
Netskope



## Beyond The Bot

**Santosh Addanki,**  
Senior Director Ai &  
Platforms, Paypal



## Using Support Insights for Proactive Backlog Management & Escalation Prediction

**Matt Dunn,**

Senior Director - Technical  
Success at Sauce Labs



# Explore Our Resources



## Beyond Measure: Achieving Team+ Leadership Alignment Using Support Insights

**Greg Giletto,**

Head of Customer & Product Support-  
Global, Bloomreach



**Hosam Hassan,**  
Director of CXT Strategy,  
PartnerHero



## Putting The Experience Back In Customer Experience

**Adrian Brady-Cesana,**

Founder and Chief Experience Officer,  
CXChronicles



## Quality Unleashed: A Candid Q+A on AI and Auto QA

**Monika Aufdermauer**

VP of User Success  
KOHO .



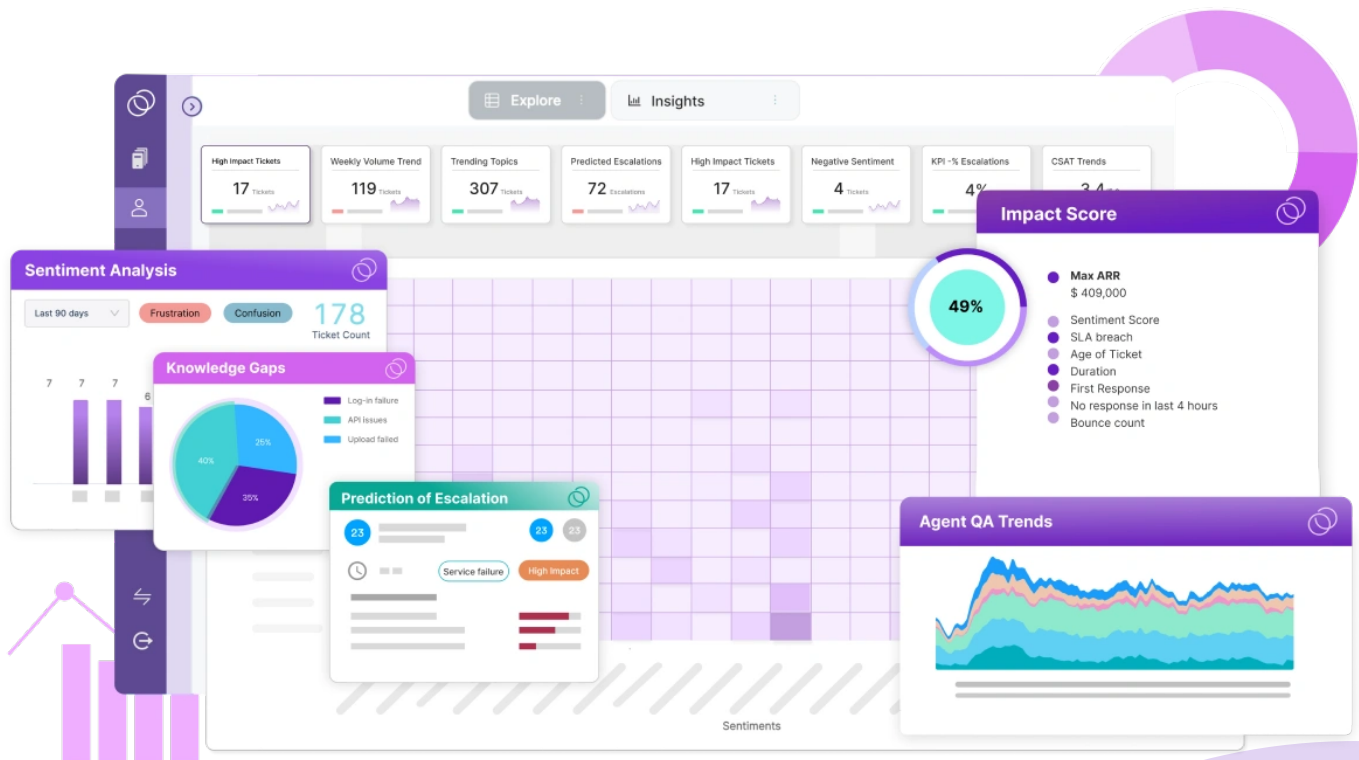
**Save The Date:**  
**February 21st, 2024**

**Declan Ivory**

VP Customer Support at Intercom  
| Leading Global Support Operations

# About TheLoops

TheLoops is an all-in-one Intelligent platform providing actionable insights for CX teams using prediction and GenAI to increase your team's productivity.



- AI Agent Copilot
- Auto QA
- Intelligent Collaboration with Voice of the Customer
- Product Feedback Analysis
- Prediction of Escalation



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