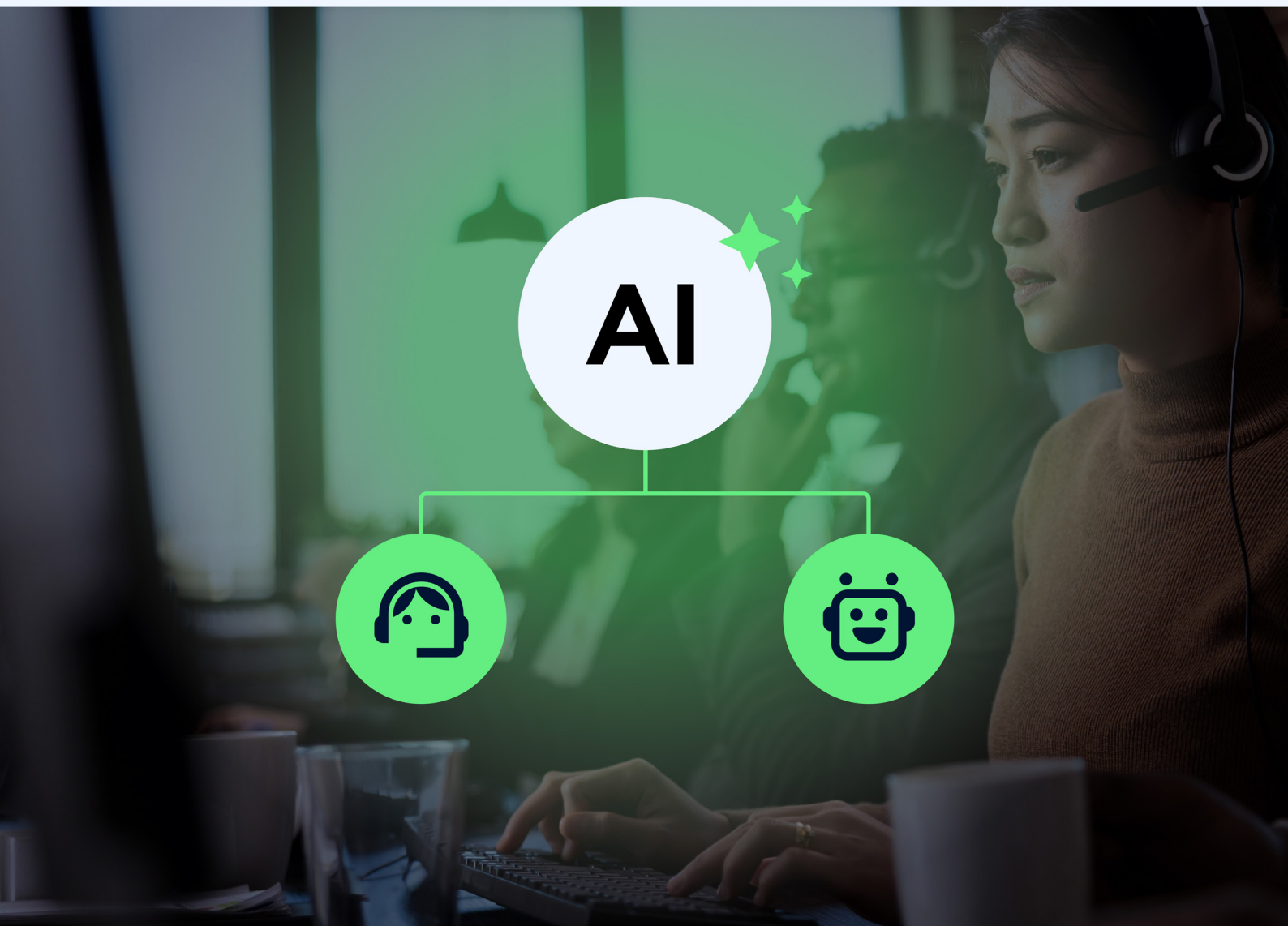




AI Agents vs. AI Chatbots: A Strategic Guide for B2B Customer Service

How to Automate & Scale Your Customer Support
Without Wasting Resources



Introduction

In 2021, Uber was expanding at a staggering rate, but growth came at a cost. After pandemic-related restrictions eased, the multinational American transportation company faced severe driver shortages and regulatory hurdles that slowed the hiring of new drivers. Wait times surged, prices fluctuated, and customer frustration grew.

One of the biggest bottlenecks was due to customer support. The high volume of tickets coming in across multiple channels required manual processing. And therein lay their problem.

Even Uber couldn't keep up with all the customer support demands. This resulted in slow response times, inconsistent resolutions, and high operational costs.

However, their team didn't panic. There was an obvious solution: AI-driven technologies. More precisely, an AI-powered robotic process automation (RPA) system. Uber quickly implemented RPA to categorize tickets and handle repetitive and time-consuming customer support tasks.

The results?

Processing time for common issues dropped from days to minutes. Customer satisfaction skyrocketed with faster response times. Cost savings were massive, with the company revenue growing from 17 to 32 billion US dollars the following year. [\[1\]](#)

Thanks to chatbots and now AI agents, automating customer service is getting easier, cheaper, and more scalable. These digital assistants can answer customer questions and automate simple tasks based on a specific set of data. But only one of them can also make dynamic decisions, plan actions, and even learn from experiences, offering unparalleled service.

Curious to know which one is the all-around solution that is more suitable for the B2B ecosystem? This ebook aims to demystify the differences between AI Agents and AI Chatbots, provide their respective benefits, and help businesses make the right choice according to their unique customer service requirements.

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The current state of B2B customer service

The need for AI-driven solutions

According to McKinsey research, more than **72% of organizations surveyed are currently adopting AI solutions**. The strongest interest is shown in generative AI and automation technologies, such as AI agents and chatbots. These solutions help organizations enhance their operations by automating procedures and providing better customer experiences. [\[2\]](#)

This high AI adoption rate is not a coincidence. The B2B landscape has always been driven by needs and less so by wants. The main need here is to solve numerous pain points of legacy customer service ecosystems.

And that's where the following benefits of AI automation come into play:

1. Increased efficiency for better margins

Modern businesses are constantly being pressured to improve margins and cut costs. Automation enabled by AI agents and chatbots lets your customer service team focus on more strategic and creative tasks that bring better ROI. Whether dealing with thousands of client inquiries or processing orders and requests, these systems can perform both basic and more complex tasks autonomously.

This builds customer relationships and brand loyalty, making sure that your paid workforce is doing meaningful work.

2. Improved customer experience

AI agents and chatbots enable B2B websites to provide instant responses to customer inquiries, 24/7. They also reduce wait times and enhance the overall customer experience. For instance, ADT Security

Service saw a 30% increase in customer satisfaction (CSAT) after implementing Tidio's AI platform. [\[3\]](#)

3. Optimized customer service costs

Global Customer Experience Excellence 2024 Report: AI agents and chatbots cut customer support costs by an average of 30%. They do so by eliminating inefficiencies in manual ticket resolution and lowering the risk of human error. [\[4\]](#)

AI agents and rule-based chatbots make highly efficient frontline support for customer questions. They can also proactively reach out to site visitors and generate leads. Tidio's own support team managed to **automate 58% of their customer service interactions**, demonstrating the potential for cost savings and increased efficiency. [\[5\]](#)

4. Higher customer engagement

AI agents and chatbots increase engagement by providing more tailored and responsive customer experiences. AI agents may personalize interactions by swiftly evaluating user preferences and behaviors, resulting in higher customer retention and brand loyalty.

5. Improved scalability potential

Efficient scalability is among the most widespread problems for almost any type of company, regardless of the industry. Luckily, AI agents and chatbots can scale quickly to handle increasing workloads. Whether coping with high-volume customer support requests or expanding into new areas, AI agents can tackle and resolve large request volumes in minutes without sacrificing performance.

6. More leads

Leads are the fuel of B2B growth, and there's always untapped potential. AI systems can help companies capture leads more effectively by providing timely and relevant information to potential customers. Here's an example for Procosmet, a luxury cosmetics brand and one of Tidio's clients. [\[6\]](#) Procosmet achieved 500% growth in monthly leads with AI automation.



Right now, more than a third of our ecommerce revenue is made thanks to Tidio.

Gabriele Scarcella

Ecommerce manager at Procosmet



Using Tidio's chat flows for handling routine inquiries and tasks, Procosmet helps their human support agents focus on more complex and high-value interactions, saving on costs and increasing productivity.

7. Multilingual support

AI agents and chatbots can handle support requests in dozens of languages, making it easier to assist clients from all around the globe. This feature ensures that language barriers are eliminated, allowing businesses to provide consistent and high-quality customer experiences across different regions.

8. Improved decision-making

AI-powered solutions like AI agents can analyze large volumes of data in real time. This enables businesses to make data-driven decisions regarding their support, marketing, sales, etc.

Ecommerce businesses, for example, can utilize AI analytics data to improve CS operations like CSAT, feedback from customers, and comments that are tracked, measured and analyzed by CS platforms. This allows them to better optimize their marketing campaigns and inventory management to match client needs more closely.

Which industries & business sizes can benefit the most?

Any B2B industry that has frequent customer interactions, complex inquiries, and the need for personalized solutions can benefit. According to MIT management research, AI adoption in the U.S. is currently concentrated in larger companies that are typically early adopters [7]. However, midsize businesses that seek quick and cost-effective scalability are also implementing AI agents.

Some of the industries with the highest AI agent adoption rates include:

- IT and software companies
- Ecommerce
- Logistics and supply chain businesses
- Financial services
- Construction

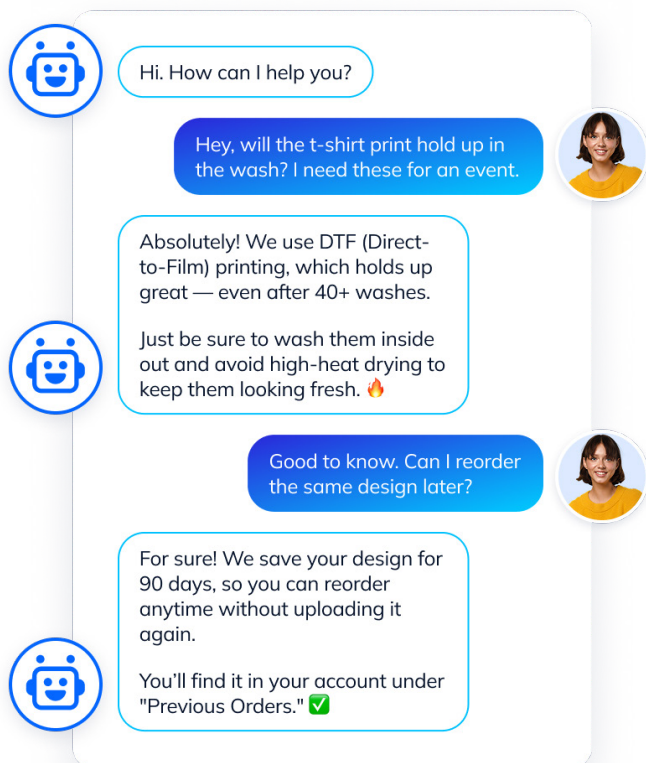
These industries typically utilize specialized knowledge and complex products or services that require prompt and accurate responses, making AI agents and chatbots an ideal fit.

Now, you may think: *Specialized knowledge and complex products? These sound like things a business wouldn't want their AI agent or chatbot taking over.*

But in reality, these solutions have proven highly useful and cost-effective.

B2B SaaS companies, for example, get fewer chats than ecommerce but rely on AI agents to break down complex features and qualify customers based on their business needs. In industries that deal with sensitive information, like financial services and healthcare, customers expect instant responses for peace of mind.

AI agents are easily implemented with your company's business knowledge and are trained similarly to human agents. Combine this with machine learning, and you get an AI agent who can answer complex and specific questions about your business or a certain software platform.



Comparing AI agents Vs. AI chatbots for customer service teams

What are AI chatbots?

A typical chatbot is a computer software that interacts with users through pre-defined rules, decision trees, and scripted responses. Chatbots, in their basic form, have been around since 1964 and are largely used to:

- Conduct basic interactions
- Obtain information
- Respond to frequent customer service concerns

Today's top customer service chatbot providers incorporate AI. They simulate human conversation with users via voice or text interactions using conversational AI techniques. This is thanks to Natural Language Processing (NLP), which allows AI chatbots to interpret user inquiries and automate appropriate responses.

AI chatbots are most effective when trained on a specific dataset and are built to answer business-related questions. This allows the chatbot to provide accurate and relevant answers to user queries while also improving everyday interactions through human-like conversation.

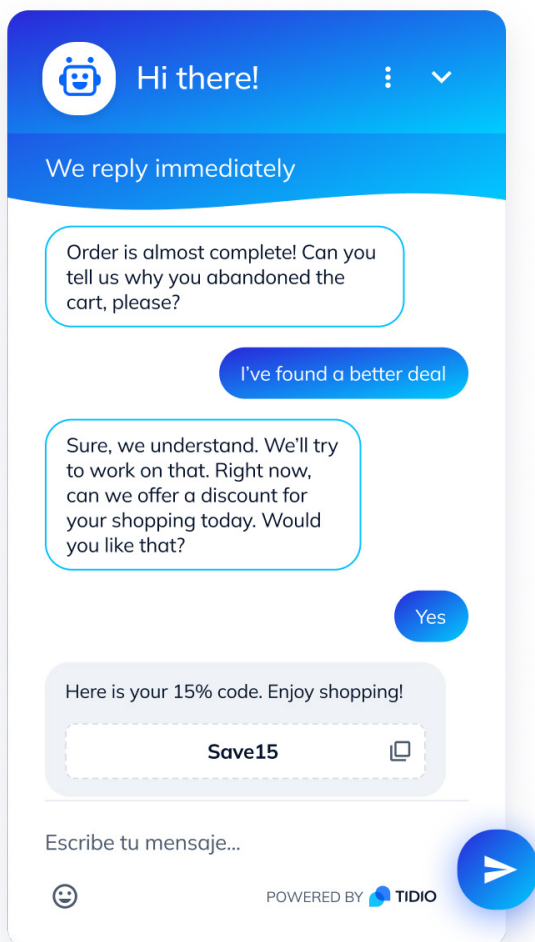
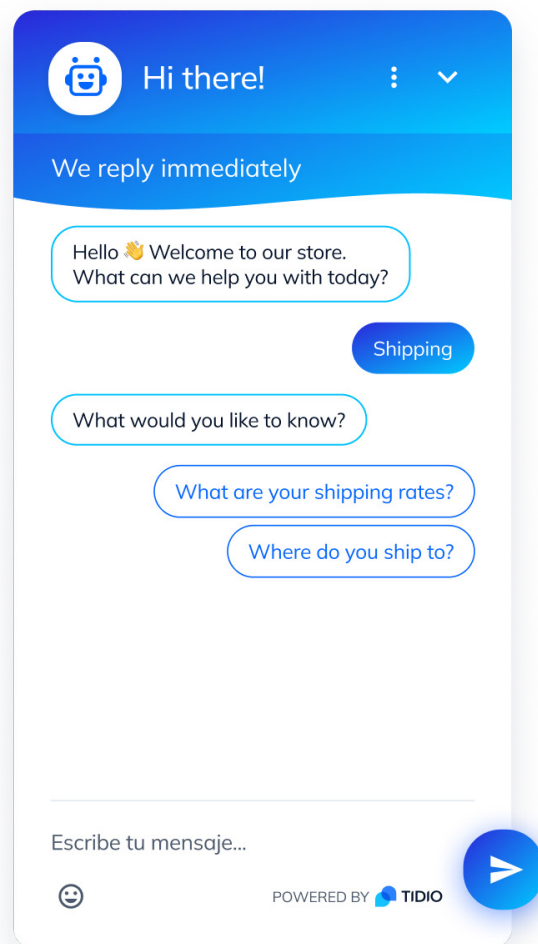
However, because they use narrow AI [\[8\]](#), chatbots are unable to perceive context outside their training or make independent decisions. As a result, they struggle to effectively respond to user inputs that are outside the boundaries of their knowledge base, which is often powered by a large language model (LLM) and specific training data.

Customer service AI chatbots: examples and use cases

AI chatbots are commonly used to automate customer interactions and streamline business processes, regardless of the industry or company size. Well-suited for handling high volumes of routine customer service queries and interactions, they're a cost-effective solution for basic customer service automation.

Here are some common AI chatbot use cases:

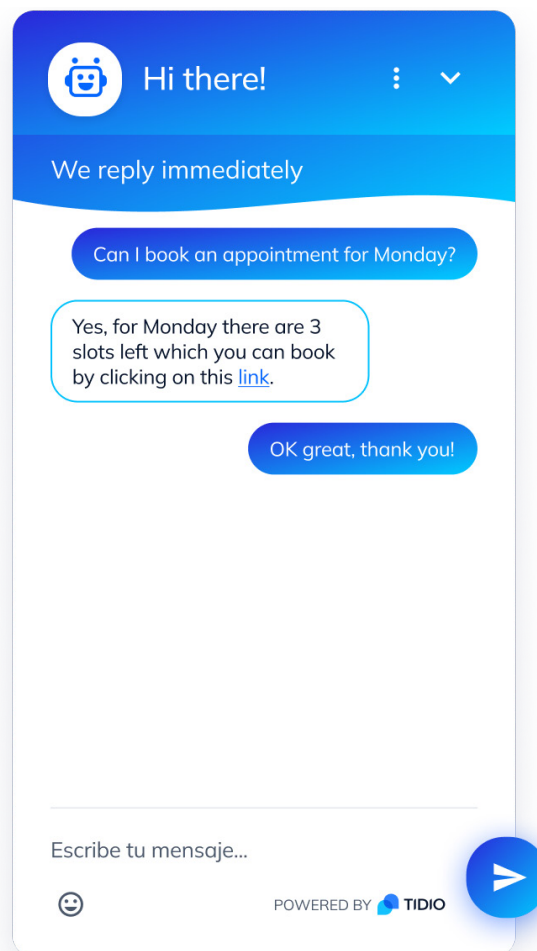
Customer support: An ecommerce site could implement an AI chatbot to answer FAQs about its shipping and return policies. They can also recommend products. This chatbot interprets customer queries and generates the most relevant response based on its training, providing immediate answers 24/7 and reducing the workload for customer service reps.



Conversion rate optimization: An online store can use Tidio's rule-based chatbots (Flows) to sell products, reduce cart abandonment, track customer communication from different channels, etc. You can automate workflows for your team using the live chat and chatbots for distributing discount codes, answering queries, and cross-selling.

Automated scheduling: An AI chatbot can automate scheduling for real estate customer service by handling appointment bookings for property viewings and consultations based on agent availability. It can also send reminders, reschedule appointments, as well as answer common queries. This will reduce manual effort and improve response times.

Lead generation: An insurance company could launch an AI chatbot on its website that captures and qualifies leads as it answers FAQs and suggests insurance plans. It can gather contact information, flag qualified leads based on predefined criteria, and integrate leads' data to help agents close more deals.



What are AI agents?

Much like the famous ad says, “I can’t believe it’s not butter,” AI agents will make you think: *I can’t believe it’s not human.*

An AI agent is an advanced AI system that operates on its own to complete tasks and assist customers. **Think of them as multifaceted AI chatbots but on steroids and with a PhD.** Unlike basic AI chatbots, which typically only reply to user inputs, AI agents make decisions autonomously, carry out multi-step plans, and even integrate external data and tools to address complicated problems.

AI Chatbot	AI Agent
<ul style="list-style-type: none"> • Responds only to exact keywords and language identifiers • Follows linear conversational paths • Deploys pre-written questions and answers 	<ul style="list-style-type: none"> • Understands natural language, grasping context and intent • Continuously self-learning via ML • Provides tailored answers based on user input • Can tackle more complex questions

An AI agent understands context, detects intent, references appropriate data, and takes action to achieve specific goals.

The way an AI agent responds to user queries, makes decisions, or solves problems is usually determined by the user’s data input. While basic automation helps with simple tasks and data processing, an AI agent can make strategic decisions and adapt its responses. For example, in insurance, an AI agent may recommend policies based on a person’s situation. If the initial offer is rejected, it asks for more information to better tailor its suggestions.

Just like we humans are a continuous work in progress and are always broadening our knowledge, AI agents also use feedback to continuously learn and develop. This allows them to handle increasingly difficult tasks over time.



Key attributes that make AI Agents different from AI chatbots



Self-sufficient: AI agents independently perform tasks, make decisions, and adapt to dynamic conditions with minimal oversight.

Example: An AI agent automatically prioritizes and routes customer inquiries to the right real estate agent based on urgency and property interest, reducing response times and improving efficiency.



Versatile and resolution-oriented: AI agents use machine learning to refine responses, analyze data, identify patterns, and adapt over time.

Example: In ecommerce, if customers frequently ask about delayed shipments, AI agents learn to proactively provide real-time tracking updates and estimated delivery times, reducing inquiry volume and improving resolution speed.



Responsive: AI agents use NLP to understand and generate human-like responses in voice or text.

Example: An AI agent in a bank's customer service workflow uses NLP to understand a customer's text or voice query, such as "I was charged a late fee even though I made my payment on time." It then responds by checking transaction records, verifying the payment date, and either explaining the charge or initiating a refund request. All without human intervention.



Objective-driven: AI agents operate within a clear scope, performing actions aligned with expected outcomes.

Example: An AI agent with access to your store's inventory suggests products based on the customer's preferences, viewing history and past purchases.

B2B AI agent case studies

There are numerous use cases for implementing an AI agent to help your business scale and grow. Take a look at these case studies for customer service management and technical support across industries like fashion, hospitality, recruitment, and custom apparel.



Company name: Ninja Transfers

Industry: Custom Apparel, DTF Transfers

Tools used: Lyro AI Agent

Summary: Ninja Transfers improved their customer support by implementing Tidio's Lyro AI, increasing resolution rates from 41% to 68%, saving over 132,000 hours in agent time, and boosting assisted sales from \$398k to \$710k during peak season.

Results overview:



68% resolution rates



132,000 agent time hours saved



boosted assisted sales



The beauty of Tidio's Lyro AI is that it doesn't just handle routine inquiries—it learns and improves over time. Our resolution rate jumped from 41% to 68%, but what that really means is thousands of customers getting immediate answers instead of waiting for a human response. That translates directly to customer satisfaction and loyalty.

Victor Illisco

Director of Sales & Operations at NinjaTransfer

[Read the full case study here.](#)





Company name: Suitor

Industry: Fashion, suit rental

Tools used: Lyro AI agent, chat flows

Results overview:



85% customer service automation



97% decrease in avg. response time



76% of visitors don't request a transfer to a human agent

Summary: Suitor uses Tidio to offer 24/7 customer service without the need for additional agents. The business automates support processes by using Lyro for FAQs, request sorting, and more.



I'm so much happier because we can trust that the customer service is being taken care of by the chatbot. I don't even have the Tidio app on my phone because I trust it to do its job.

Daniel Reid

Co-founder and CEO of Suitor

[Read the full story here](#)



Company name: Gecko Hospitality

Industry: Hospitality recruitment

Tools used: Lyro AI agent, rule-based chatbots, live chat

Results overview:



15% increase in applicant engagement



30% reduction in average response time

Summary: Gecko Hospitality adopted Tidio to improve applicant engagement and reduce response times. The combination of rule-based chatbots and the Lyro AI agent, as well as live chat, allows for quicker responses and more efficient resolutions. This helped Gecko Hospitality enhance its service delivery and candidate experience.



At present, about 90% of conversations are handled by Lyro [Tidio's AI chatbot], and in the vast majority of cases, the responses have been perfect. These responses are audited daily to ensure that the correct responses and information is given.

Max Sealey

Support Service Manager at Gecko

[Read the full story here](#)



Choosing the right solution and getting started

What to consider when choosing between AI Agents and AI Chatbots

Many companies struggle to determine if AI Chatbots or AI Agents are better suited to their automation requirements. At this point in technological evolution, choosing an AI agent over chatbots is the only reasonable path for modern businesses, especially those with high visitor volumes. The only reason for going with an AI chatbot is an insufficient budget, but you will get limited features, which will only frustrate your customers.

To make things easier, here's a checklist of common automation needs that are easily met with an AI agent like Lyro:

- 1. Handling customer inquiries:** from simple FAQs and basic tasks to complex conversations, decision-making, and multi-step processes.
- 2. Personalization and context awareness:** from basic responses to an AI solution that remembers past interactions and adapts accordingly, providing a more human-like experience.
- 3. Integration and scalability with existing systems:** AI agents allow easy scalability and integration across multiple devices and platforms.
- 4. Human agent collaboration:** AI agents help visitors directly and only forward chats that absolutely need human assistance.
- 5. Learning capabilities:** from basic data handling to recommendations and improved conversational clarity.
- 6. Budget and implementation:** modern AI agents like Lyro are cost effective and easy to deploy despite being more advanced systems with multifaceted features.

Feature	AI agent	AI Chatbot
Tidio's Lyro AI Agent	Reactive; follows predefined rules and responds based on user input. *(Tidio's rule-based Flow can initiate predefined message paths based on triggers, and Lyro can take over when the inquiry becomes more complex.)	Context-aware; capable of guiding the conversation forward and triggering relevant actions based on user intent.
Context retention	Typically limited to the current session	Remembers session history, can jump back and forth between topics
Decision-making	Linear; sometimes rule-based, but limited task range	Dynamic, context- & intent-based
Task complexity	Low; simple and repetitive tasks	Complex, multi-step tasks
Learning capacity	Continuous but within a limited spectrum	Continuous learning and evolution

Use case example:

Let's say you have an ecommerce business with 1000 products. It would be a challenge to have chatbot reactions tailored to each product, especially in terms of maintenance and training CS reps in the product portfolio. Not to mention scalability issues once the product portfolio starts to grow.

This is where AI Agents come into play. AI agents are able to learn about new products and terms, performing actions with the same efficiency regardless of portfolio size - all the while being managed by a single person.

How to get started with B2B Customer Service AI agents

Understanding the difference between AI chatbots and AI agents is critical for businesses to choose the right technology. AI agents are becoming increasingly important in managing complex consumer interactions, providing tailored experiences, and automating activities at scale.

Unlike chatbots, they are more sophisticated tools that can:

- Handle multi-step activities
- Adapt to real-time conversation
- Deliver tailored solutions

However, you may have some concerns about implementing an AI agent solution. Let us remove those obstacles real quick:

Worried about implementation costs and ROI?

Don't be. AI agents will only reduce your CS costs (and do so by 30% on average, according to IBM [\[9\]](#)), which will positively impact your ROI.

Afraid of changing your CS system (moving tickets, historical data, etc)?

No need. Lyro can work on top of Zendesk and Salesforce. If customers want to move fully to the Tidio CS Platform, our Implementation team can do the transition for them as a white glove service.

Worried about the potential disconnection from your brand's voice?

Don't be. AI agents like Lyro are trained directly on your brand's existing help center, FAQs, documents, or most frequent CS tickets. Lyro reflects your brand's tone, vocabulary, and style automatically – because it's not generically trained, it's specialized on your own content.

Not sure about trusting AI-based solutions to handle business-critical questions?

No need for this concern. AI agents are

designed for accuracy, ensuring reliable responses while continuously learning to improve customer interactions. And if the tool can't provide an accurate and adequate answer, it immediately transfers the conversation over to a human.

Thinking about the potential additional workload of managing AI on top of your existing human workforce?

No worries about that. AI agents reduce your team's workload by handling routine inquiries, allowing your human workforce to focus on complex and high-value tasks.

Privacy and security concerns?

No need for those. AI agent solutions are built with robust security measures and compliance standards to protect sensitive customer data.

Worried about the integration process across other channels being too complicated?

It doesn't have to be. AI agents like Lyro seamlessly integrate with your existing platforms, ensuring a smooth transition without disrupting your current workflows.

Get started with an AI agent in 9 simple steps

Helpdesk platforms are aware of the demand for more multilingual systems, personalized experiences, AI-powered automation, data analytics, and sales assistance. Right now, the top platforms are in a race to implement a holistic system that meets these demands.

1. Define your objectives

Begin by establishing your goals for your intelligent agent. For example, you may use it to offer customer service, streamline processes, or improve your marketing and sales. You can design a specialized agent for each target, so having a clear goal will make implementation easier and allow you to track success.

2. Prepare your data

To perform successfully, AI agents need access to massive amounts of high-quality business data. This includes past conversations, consumer data, product and service information, transaction histories, social media, and other pertinent information.

With Lyro, for instance, this is quick and user-friendly. You can either provide Lyro with your website URL to extract key information, add your data manually using a Q&A format, or upload a file with your knowledge base content. From there, it quickly processes the data and gets ready to assist customers.

3. Opt for the right type of AI agent

Select the AI agent platform with the optimal set of features that best suits your use cases and support strategy. For example, if you run a large global business, you may want to go with an AI agent with multilingual features, omnichannel messaging, and agent routing. If you run a midsize business, you may opt for a solution that can help with collecting and converting leads, demand forecasting, and making personalized recommendations.

4. Integrate with systems and tools

Make sure your AI agent connects seamlessly with your CRM, databases, and third-party applications. This integration will enable your AI agent to access relevant data and keep all tickets, conversations, and updates in your platform of choice. The result? More efficient problem resolutions and a superior customer experience.

5. Train your AI agent

Helpdesks are becoming key players in sales assistance. With access to customer data and behavior insights, AI-powered systems can identify potential upsell and cross-sell opportunities during interactions.

For example, if a customer asks about a product, the helpdesk system can suggest complementary items or offer personalized promotions. And with only 44% of helpdesk providers offering sales-enablement tools, this is quite a new trend that's only about to grow in the near future.

6. Implement human oversight

While AI agents can work independently, it's critical to regularly check their conversations for correctness, relevance, and consistency. Make sure it's always easy for your AI agent to escalate issues to your human agents, and set rules for what types of requests should be automatically forwarded to your team.

7. Monitor and optimize

Gather user input and ratings to evaluate how your AI agent is performing. This will influence any improvements and track performance to ensure your AI agent is meeting customer expectations and operating to its full potential.

8. Protect user data and privacy

Because AI agents handle significant amounts of sensitive user data, it's critical to adopt and communicate strong security and data privacy protections to keep consumers safe. It's also important not to use your AI agent to deceive users by pretending it's a human. This can frustrate customers and hurt their trust in your brand.

9. Prioritize user experience

When designing an AI agent, keep your end user in mind. Test its responses rigorously to ensure they are quick, accurate, and provide a great customer experience.

Top B2B Customer Service AI agents and chatbots on the market

Platform	Made for	Free plan?	Standout feature	Pricing
Tidio's Lyro AI Agent	Businesses of all sizes looking for cost-effective automation	YES	Lyro AI Agent with guaranteed 50% resolution rate for premium customers, live chat, helpdesk, ticketing automation, lead gen, and sales	Paid plans starting from \$29/month
Zendesk AI	Companies looking to streamline customer support	NO	Automatically resolves tickets within Zendesk's ecosystem	Custom
Intercom's Fin AI Agent	Large businesses needing AI-driven, personalized customer interactions	NO	Advanced conversational AI with real-time agent assistance	Starts at \$39/month
Drift AI Chatbot	Sales teams looking to qualify leads through AI-driven conversations	NO	AI-powered sales engagement with marketing automation	Custom
Ada AI Chatbot	Large enterprises automating high-volume customer interactions	NO	Context-aware AI that personalizes responses at scale Context-aware AI that personalizes responses at scale	Custom
HubSpot Chatbot Builder	Companies that rely on HubSpot CRM for marketing and customer interactions	YES	Deep CRM integration for seamless lead nurturing	Paid plans start at \$50/month
Freddy AI by Freshdesk	Organizations requiring AI-powered omnichannel support	NO	AI-driven ticket management across multiple platforms	Paid plans starting from \$29/month

Start with Tidio's Lyro AI agent today

By choosing an AI-powered customer service provider that offers AI agent solutions, such as Tidio's Lyro, you can deploy your own AI agent for customer service in minutes, not hours.

“

Lyro can handle up to 70% of common customer questions, freeing your real agents to solve complex tickets.

Tidio team

”

With an AI agent like Lyro, you can improve your response times and increase customer satisfaction with automated support conversations. [\[10\]](#)

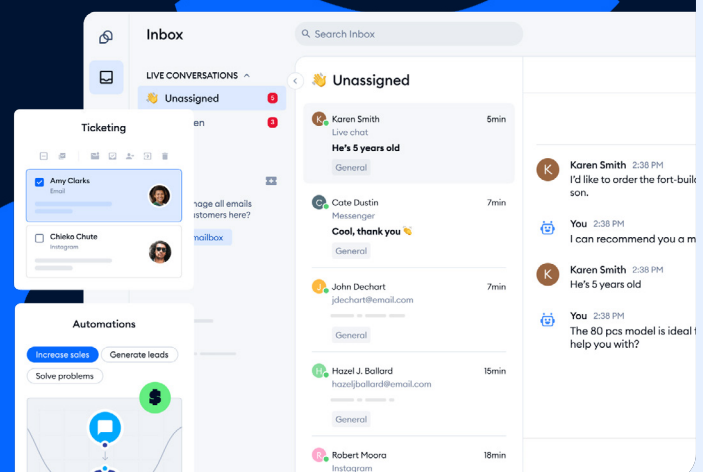
Lyro benefits and features - quick overview:

- Free account with Tidio
- Automation of up to 70% of customer interactions
- 40+ chat flow templates
- Automated ticketing system
- Live chat with real-time visitors' view
- First response time reduced to seconds

Ready to save up to 70% of your team's time with Tidio's Lyro AI Agent? Join 300,000+ other businesses that are already cutting their customer service costs and improving their ROI.

Start your free 7-day trial to explore all Tidio features

Start free trial



Sources

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- [8] [What is narrow AI \(weak AI\)?](#)
- [9] [Using generative AI to accelerate product innovation](#)
- [10] [Win up to 70% of your team's time back with Lyro AI Agent](#)