

# AI-assisted customer service for your online business

Strategies on how to leverage AI in online customer service



# Table of content

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## **Glossary of terms** 3

## **Introduction to AI** 4

Latest artificial intelligence developments

Machine learning explained

Main benefits for your business

## **CS automation strategies** 6

Strategy 1: Respond to FAQs

Strategy 2: Answer customer service questions

Strategy 3: Support operators with a reply assistant

Strategy 4: Analyze intents

Strategy 5: Search through smart views

Strategy 6: Segment audience

Strategy 7: Tailor recommendations

Strategy 8: Onboard customers

Strategy 9: Track deliveries on autopilot

Strategy 10: Process returns

## **Conclusion** 22

# Glossary of terms

## **Artificial Intelligence (AI)**

Computer systems that can simulate human intelligence processes, such as speech recognition, language translation, and more.

## **Chatbot**

Computer software designed to interact with human users via text messages or voice commands.

## **Customer Relationship Management (CRM)**

System for managing all relationships and interactions between a company and its customers.

## **Machine Learning**

Capability of machines to learn and adapt with experiences by using algorithms and statistical models.

## **Deep Learning**

Subset of machine learning, based on artificial neural networks that can progressively learn from increasing amounts of data.

## **Natural Language Processing (NLP)**

A way of processing human language that uses machine learning models to understand and construct speech and text.

## **Neural Networks**

A method to process data using interconnected nodes in a layered structure that helps machine learning models learn.

## **Speech recognition**

capability to identify and reply to human speech in a written or spoken form

# Introduction to AI

The development of smart voice assistants like Apple Siri, Amazon Alexa, Google Assistant, and Microsoft Cortana took artificial intelligence technology to a whole new level. These systems are getting trained with every interaction which helps them understand more and more every day.

On top of that, in 2022, ChatGPT shook the internet. Alongside Google Brain and BERT, they pushed the boundary of what's possible for artificial intelligence. Nowadays, we can use AI to write text, create art, translate languages, solve mathematical problems, and much more—without human supervision.

The developments in the field of algorithms and machine learning allow programmers to build more effective systems day by day. These models use artificial intelligence to benefit businesses as well as individuals from customer service all the way to delivery of the products.

Let's take machine learning as an example of these developments. It starts with a vast amount of data from the internet, including Wikipedia, forums, and web pages. After training a model on this data, it learns how to capture the context and language rules.

## You can try this technology in two ways.

The two models are pre-trained for other developers to use, fine-tune, and adjust to individual needs. So, essentially, you could take one of these models, provide it with your own data, and use the AI machine learning technology to communicate with your customers.

Keep in mind that we've only scratched the surface here. But now you should know enough to get into the topic of AI technology that is in use today.

It can't be denied that AI technology has many benefits for individuals and businesses alike. In fact, based on our studies:

- AI improves the productivity of over 80% of customer support employees
- Over 90% of customers are satisfied with their interactions with the chatbot
- About 62% of shoppers would use chatbots instead of waiting for a human agent's call
- People would rather use a chatbot for checking their order (71%), searching for products (67%), and getting deal information (62%).



1

## Training

## Data

Basically internet

Wikipedia  
Books  
Internet forums  
Web pages  
Code

Models that  
generates  
texts

AI chatbot is a computer program  
that uses natural language processing  
(NLP) to simulate conversations.

AI chatbot is a computer program  
that uses natural language  
processing (NLP) to simulate to

AI chatbot is a computer program  
that uses natural language  
processing (NLP) to simulate

Product  
acted weird

Model  
prediction

Truth

Model  
(GPT-3)

Project

≠

Project

Model  
(GPT-3)

Management

=

Management

## Model

Pre-trained  
model

Pre-trained  
model

GPT-3

fine-tune with your own data

### Adjusting to your own problem

Formulate a task using  
natural language

Magic  
wand

Intercom  
summarization

Chat  
GPT

Your own  
model

2

## Training

## Data

Basically internet

Wikipedia  
Books  
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Models that  
encap-  
sulates  
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AI chatbot is a computer program  
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AI chatbot is a computer [     ]  
that uses natural language [     ]  
(NLP) to simulate conversations.

Predicts  
masked tokens

Model  
prediction

Truth

Model  
(BERT)

Machines

≠

Products

Practice

=

Practice

## Model

Pre-trained  
model

Models that encapsulates  
context to text

BERT

fine-tune with  
your own data

### Adjusting to your own problem

## Tidio models

Customer Satisfaction

Intent classification

Visitor Says

So, let's get started on the customer service automation strategies that will improve your business.

# Customer service automation strategies

These tactics will help your business at every stage of the customer's journey, from frequently asked questions and sales processes, to delivery tracking and processing refunds.

## Respond to FAQs

### Strategy 1

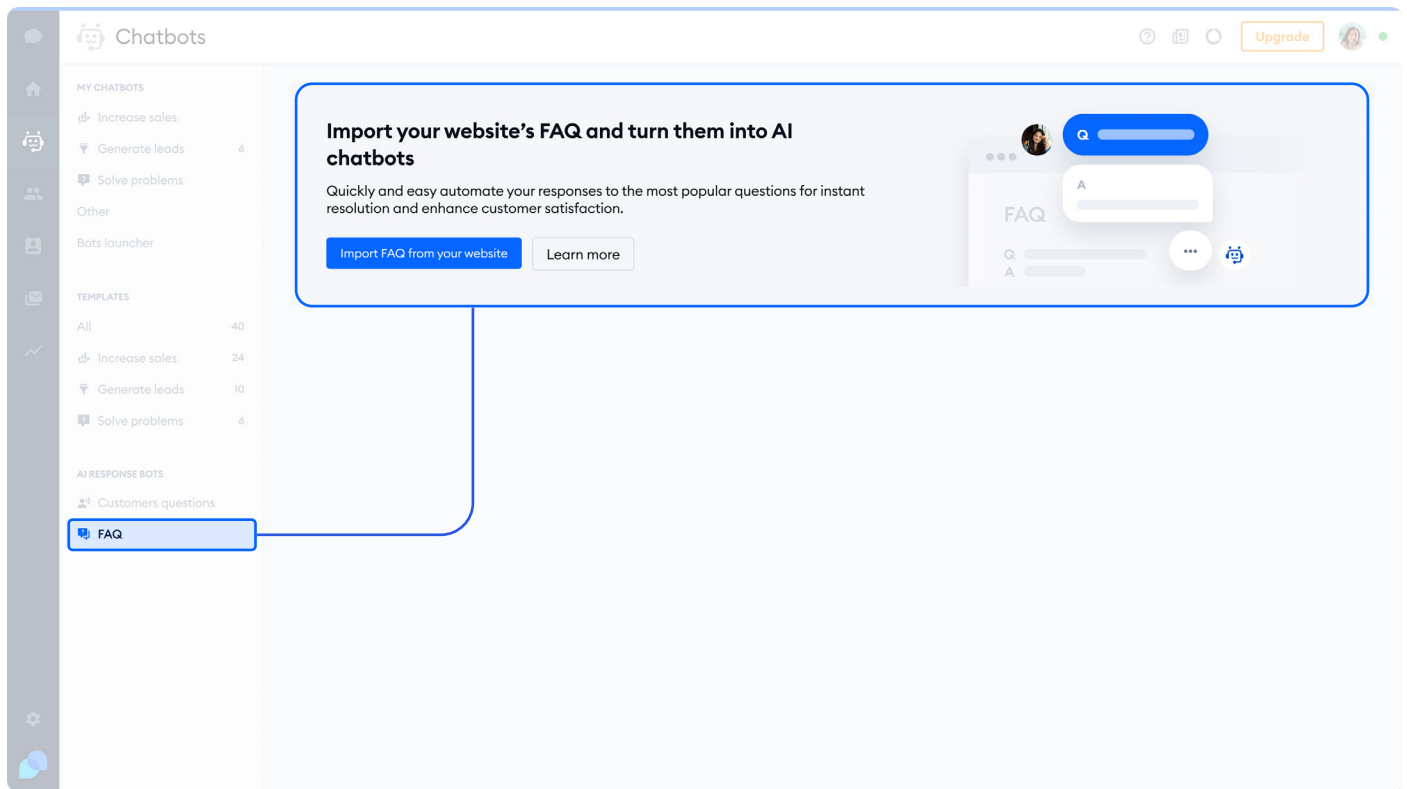
Answering FAQs is one of the most repetitive tasks that your support agents need to do. And good news is that you can automate most of them. The client will get their answer quickly, and your representative will be able to focus on more complex queries—it's a win-win situation.

#### Tools to use: [FAQ scraper](#)

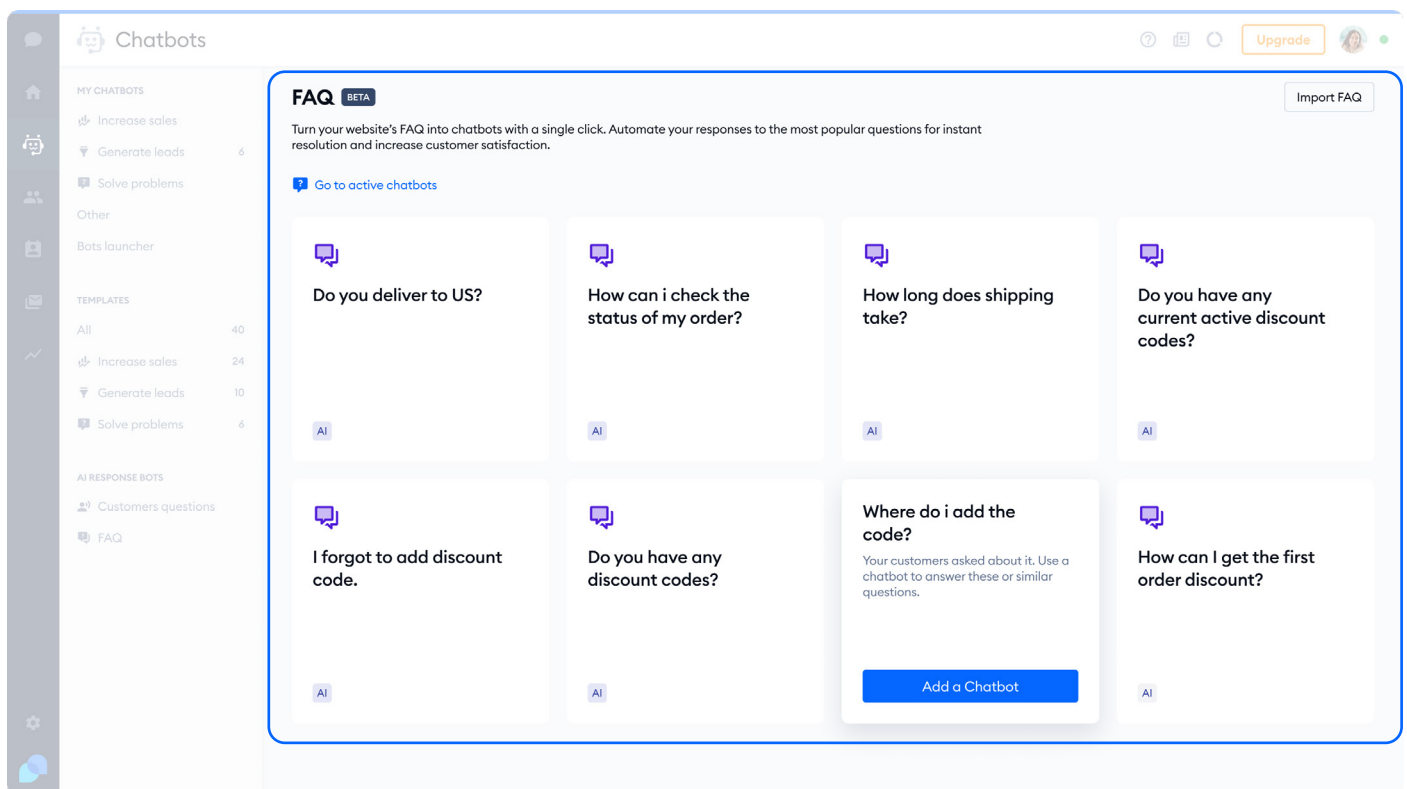
Use chatbots to scrape your pages with frequently asked questions and answer visitors from anywhere on your website. This software will pull your FAQ page info directly into chatbots creating AI bots out of each one of the questions.

Here's how you can **use the FAQ scraper by Tidio on your website:**

1. Go to your [Chatbots](#) tab
2. Click on the [FAQ](#) option
3. Pick [Import FAQ](#) from your website



4. Once the question-answer pairs have been imported, the view will look like this:



5. You can choose which one of these FAQs you'd like to turn into chatbots and customize

In the background, the system looks for a FAQ page or links on your website, fetches those question-answer pairs, and creates AI chatbots out of the elements.

# Answer customer service questions

## Strategy 2

AI chatbots use a machine learning model to detect the question topic and answer appropriately. You need to provide the answers to the questions, but the bot can recognize different topic categories using natural language processing (NLP).

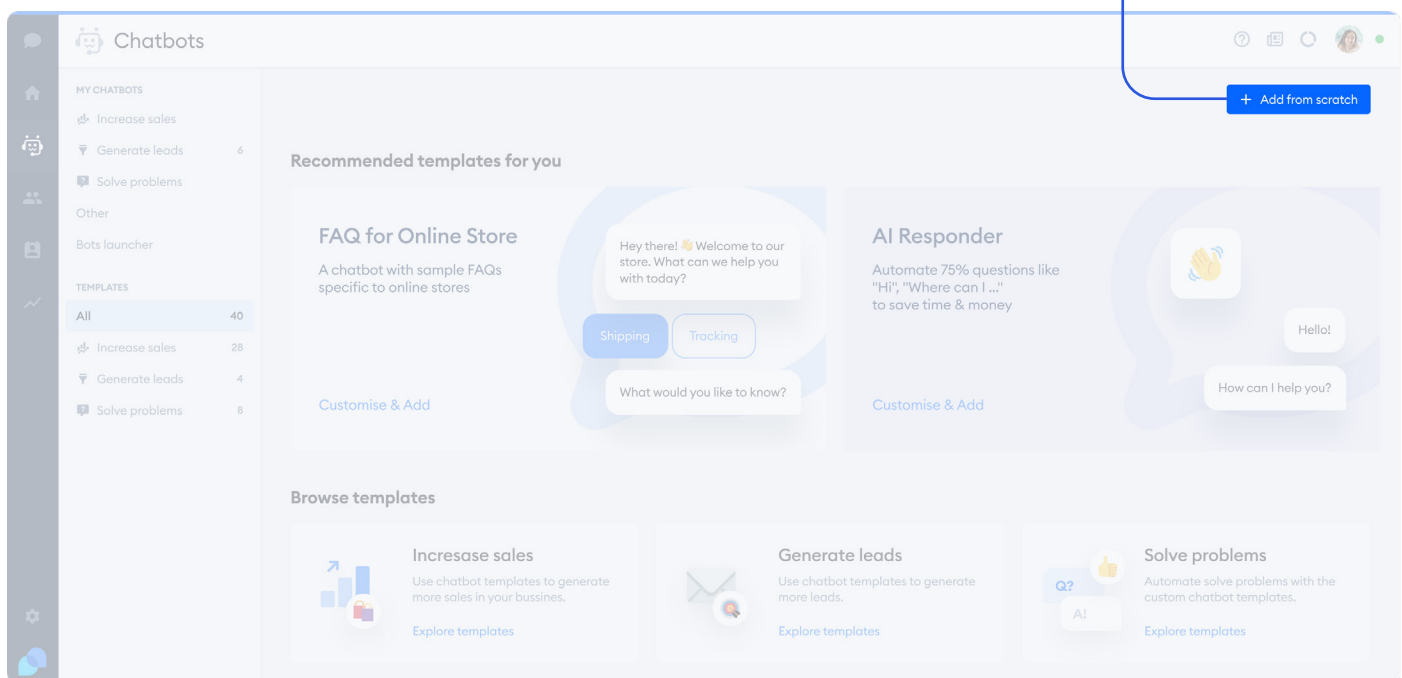
These chatbots make the interactions with users feel more natural and, therefore, improve the overall experience of your customers. No more “Sorry, I didn’t get that” messages! Artificial intelligence chatbots actually understand what your visitors are saying.

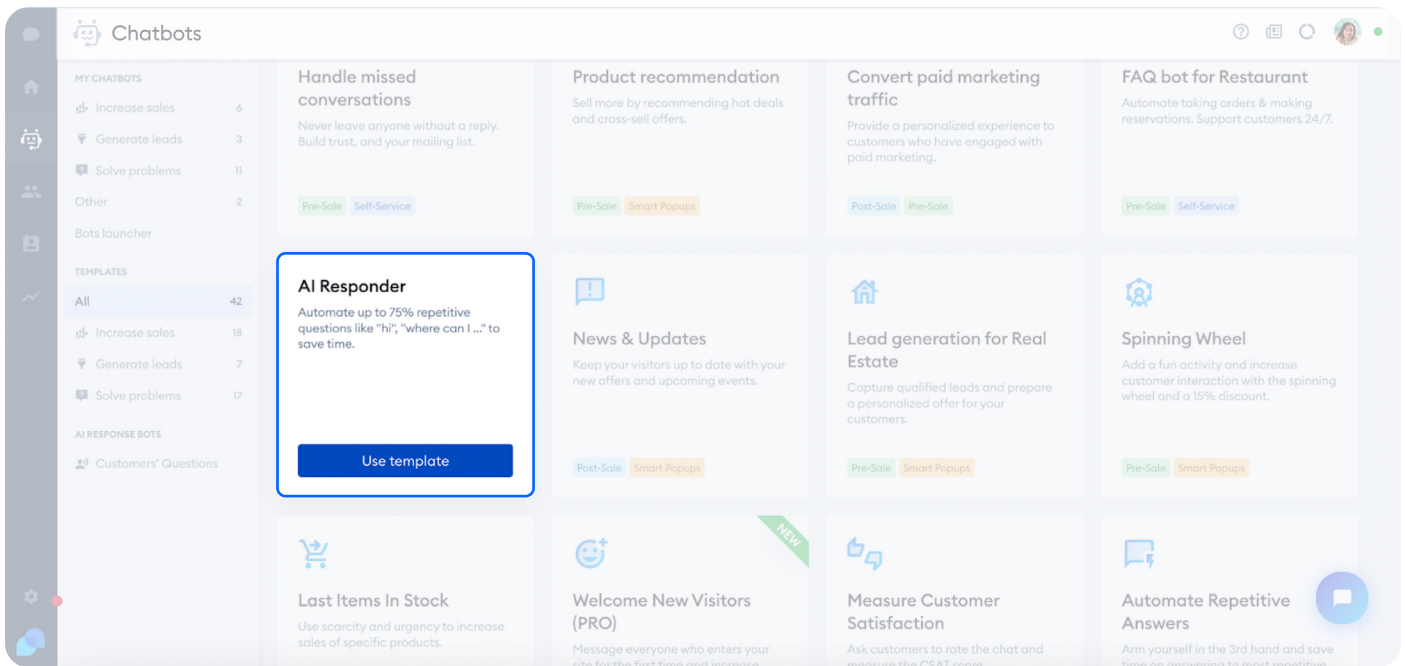


### Tools to use: [Tidio’s AI Phrase Matcher](#), [Tidio’s Conversational bots](#)

So, how to use AI chatbots for answering customer service questions?  
Follow the simple steps below:

1. Go to [Chatbots](#) tab
2. Choose an [AI Responder](#) template or click [Add from Scratch](#)

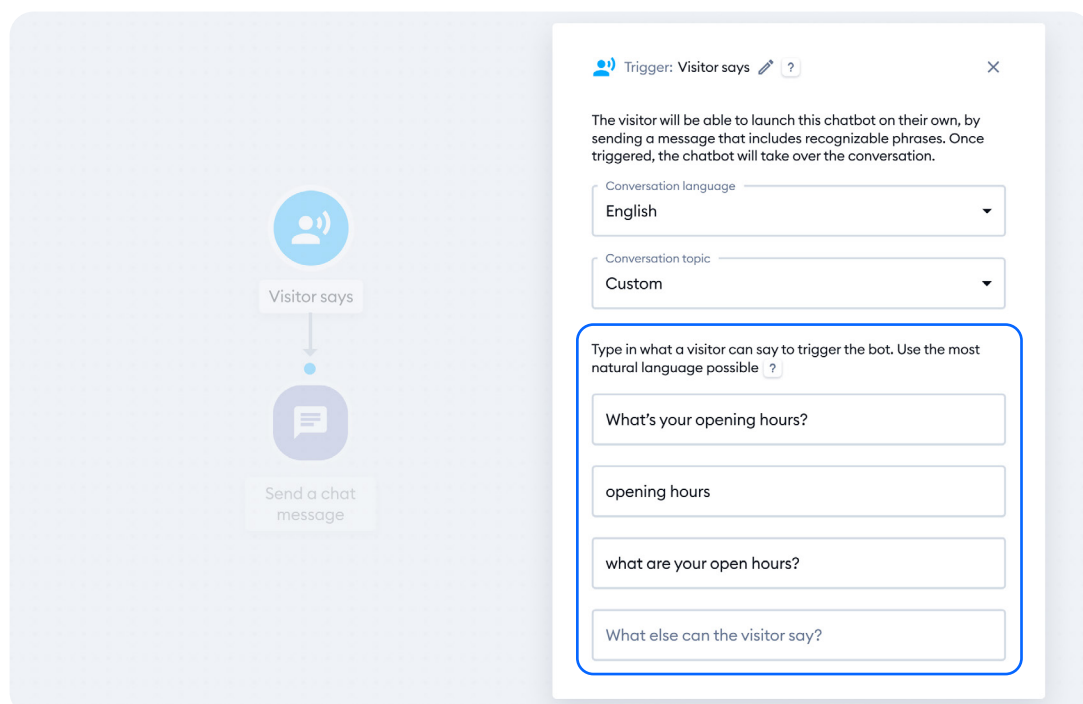




3. Input all of the phrases that your visitors could use when asking the question
4. Click on the [Send a chat message](#) node
5. Write down the answer to the question

## Pro-tip

Remember that this answer will be sent to your visitors word-for-word so ensure you're specific and professional. You can also use links in case the user needs further guidance.



# Support operations with a reply assistant

## Strategy 3

In real life, the support agent types a keyword and the system helps to prepare a professional and complex reply. The function uses ChatGPT model to generate full sentences based on the keywords provided.

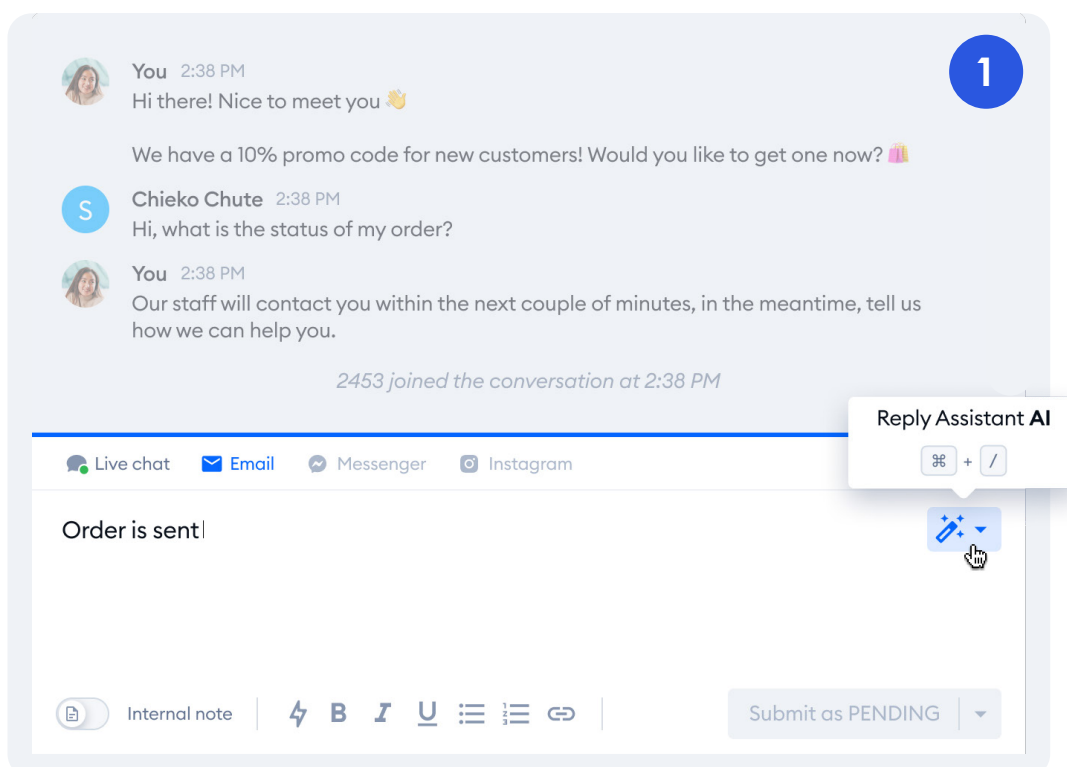
### Tools to use: Reply Assistant, AI Assistant

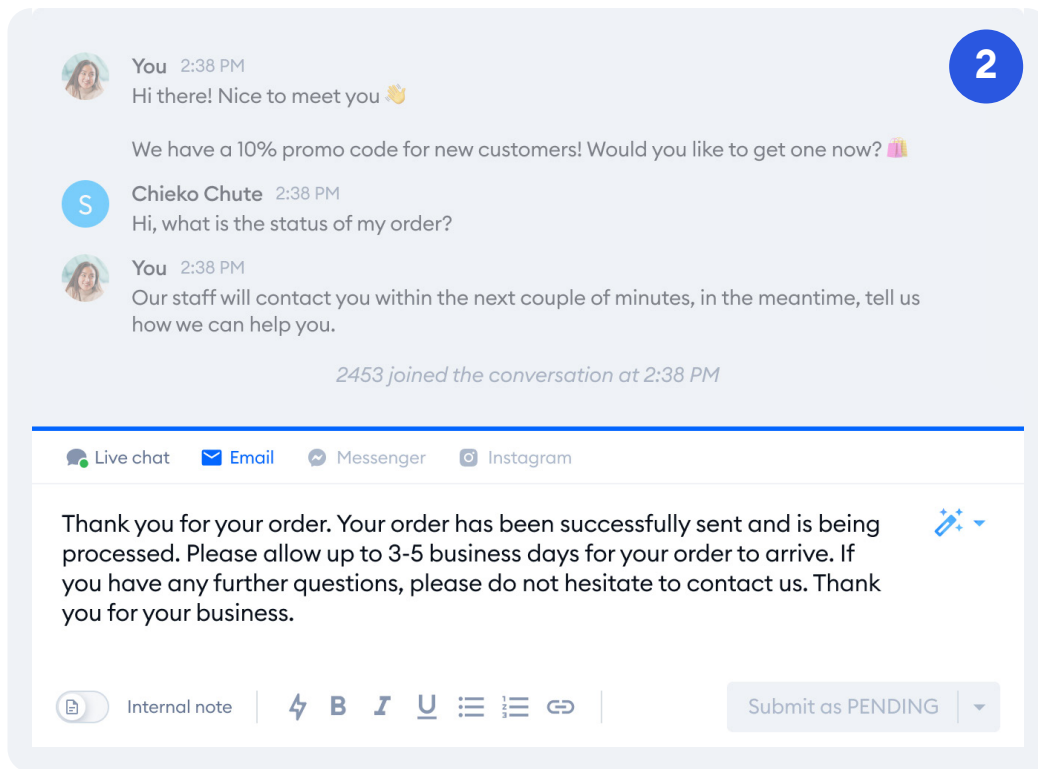
Tidio's Reply Assistant is an AI-powered response generator that works based on keywords. It helps the operators stay professional and keep the level of communication consistent between interactions.

Think of it as canned responses that got the help of artificial intelligence.

Let's have a look at how support operators can **use the reply assistant to automate some of their work:**

1. Go to the ticket you need to solve
2. Start typing your reply
3. Press the **blue wand symbol** on the right-hand side
4. The full message should be typed into your window
5. You can personalize and change the reply however you need before sending it





So, basically when you write a message and press the magic wand button, the line will change to a full reply.

## Respond to FAQs

### Strategy 4

Going through your customer queries, categorizing them, and determining their intents takes a lot of time and effort. But now AI can help you with these tasks.

Artificial intelligence can scan your customer inquiries and analyze them. Once the system is done, you'll get a clear view of the topics your visitors are asking about and will be able to act upon them.

### Tools to use: **Customer Intents, XM discover**

Tidio's Customer Intents categorizes conversations based on four topics (products, order status, order issues, and shipping policy). The system uses a machine learning model to detect what the user says and refers to. It then categorizes them and shows the conversations as raw numbers in Analytics sections to allow you to have a quick view and quickly create bots from them.

This software can help your team prioritize tasks, spot repeating intents of queries, and divide the conversations more efficiently.

Here's how **Customer Intents** work and how you can use them:

1. Go to the [Chatbots](#) tab
2. Click on the [Customers' Questions](#) – here, you can see all the most common customer queries, number of times they were asked, and the percentage of these topics out of all the questions
3. Click [Automate response](#) to automatically create chatbots from the topics

The screenshot shows the 'Chatbots' interface with a sidebar on the left containing 'MY CHATBOTS' and 'AI RESPONSE BOTS' sections. The main area is titled 'Customers' questions' and displays a table of common customer queries. A blue box highlights the 'Customers' Questions' option in the sidebar, and another blue box highlights the 'Automate response' button for each row in the table.

Intents ?	Asked	% of all questions	Time saving potential ?
Order status	145	20.96%	340 min
Shipping policy	91	11.20%	245 min
Generic support questions	71	10.16%	120 min
Order cancellation	30	11.20%	100 min
Order support	26	11.20%	60 min
Account	26	11.20%	50 min

**Get our customer success team to customize the AI tool to your needs**

[Book a demo](#)



Hi, how can I change my order?



Write your message...

# Search through smart views

## Strategy 5

Artificial intelligence can sort incoming communication into folders corresponding to the intent of the message. This way, you get a single view of all of your customer communications categorized into topics, and quickly identifiable.

The views can help your team prioritize messages that are more crucial for your business. At the same time, you'll see the topic of the conversation before opening the message, which can speed up the process of solving tickets.

### Tools to use: Smart views

Tidio's Smart views keep your messages organized for the human representatives and improve the efficiency of your teams. So, let's learn **how to set them up and view them** in a few simple steps:

1. Go to your [Inbox section](#)
2. Here, you'll find [Views](#) for the incoming tickets – by default, there are four views in this section
3. Click on the plus sign to add more views
4. Pick the view to look through the queries regarding that topic
5. Divide the views to the correct teams for more efficient workflows

The screenshot displays the Tidio customer service interface. On the left, the 'Inbox' sidebar shows a list of 'Views' for the 'Products' category, including 'Unassigned', 'My open', and 'Solved' tickets. The main chat area shows a conversation with a chatbot named '#kp838l' and a customer named 'Arthur'. The chatbot's message is: 'Hi there, Do you have those great olive...'. The customer's message is: 'Is it a typical S size though?'. The chatbot's response is: 'I've, been looking for this model for ages. I will order right away if you have them!'. The customer's response is: 'Hello 🙋 What can I help you with?'. The right sidebar shows customer information for '#kp838l' from 'Goleniów, Poland' and options to 'Add a ticket...' or 'Ask visitor for opinion'.

To customize your communication with customers effectively, you have to segment your audience into specific groups, depending on their behavior, location, etc. And automating this process can make it quicker and easier for your agents as well as more accurate in the long run as you remove the human error from the action.

All you need to do is provide rules and guidelines for the technology to run on. Artificial intelligence systems will then separate your users into segments and groups according to your preferences.

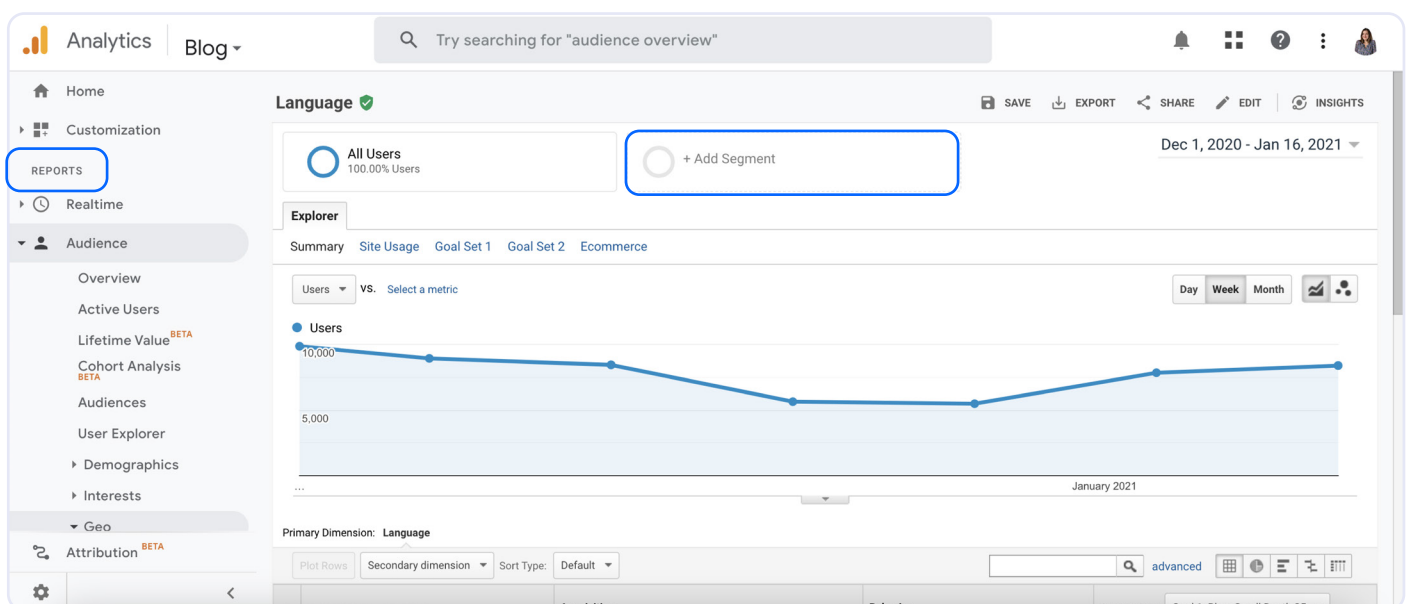
### Tools to use: [Segment](#), [Google Analytics](#)

Let's take Google Analytics as an example.

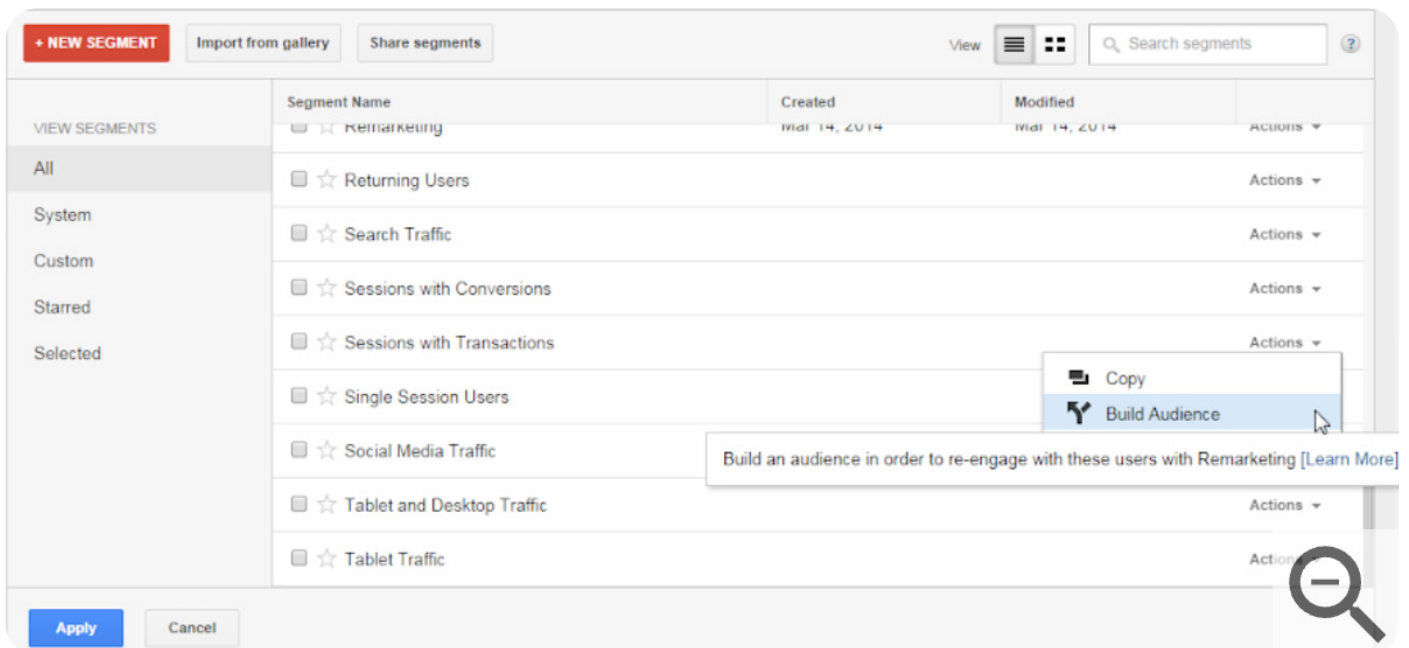
A segment in Google Analytics is a subset of your data, like users from a specific country or those that bought an item from a particular line of your products. Segments are made up of filters that isolate subsets of sessions, users, or hits.

To **add segments in your Google Analytics**:

1. Sign in to your account
2. Open the view that you want to use
3. Click on the report you want to segment
4. At the top of the page, you'll find the [Add segment](#) button



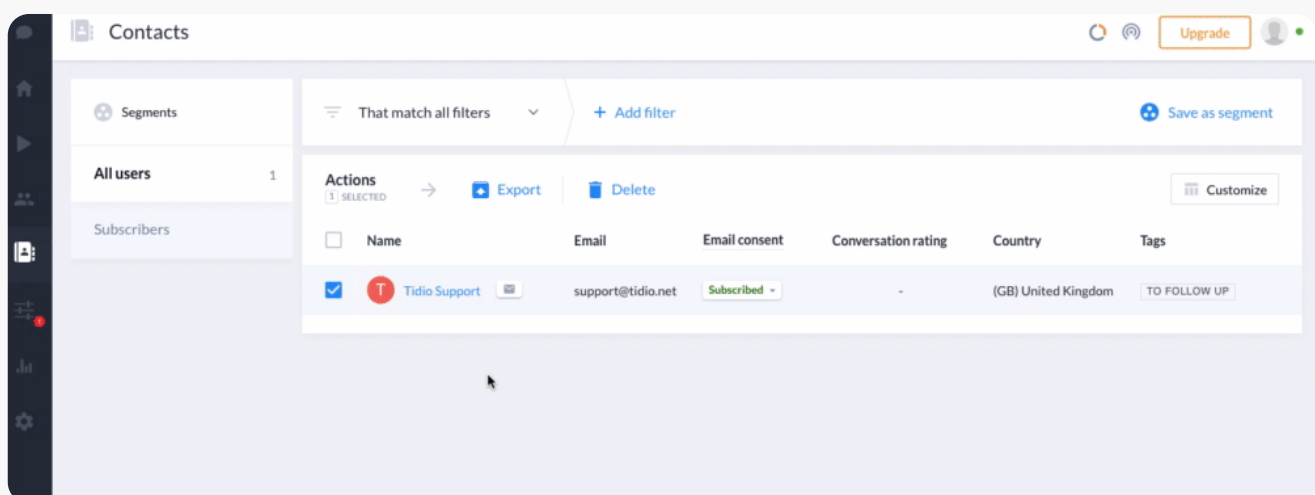
Once you have the segments list ready, you can use these for creating an audience. Simply find the segment that will become the basis for your audience, click Actions, then choose Build Audience. That's it!



Segments and audiences help with marketing efforts as you can better target your visitors and personalize the communication with them. They can also help you understand your customer and their behaviors better.

## Pro-tip

You can also segment your audience using Tidio by going to your Contacts tab and marking all the users you'd like to place in a specific segment. Then click the Save as segment button and add a name for it. That's it! The segment is created from the contacts you chose.



When you're browsing Amazon or watching Netflix, there's always a "Recommended for you" section. This is mostly based on your previous searches, where the system figures out your interests and suggests further items you might like.

Two of the biggest benefits of recommendations are improved personalization of the customer experiences and higher sales for the company. That's because you can upsell products while making the customer feel like you know them well.

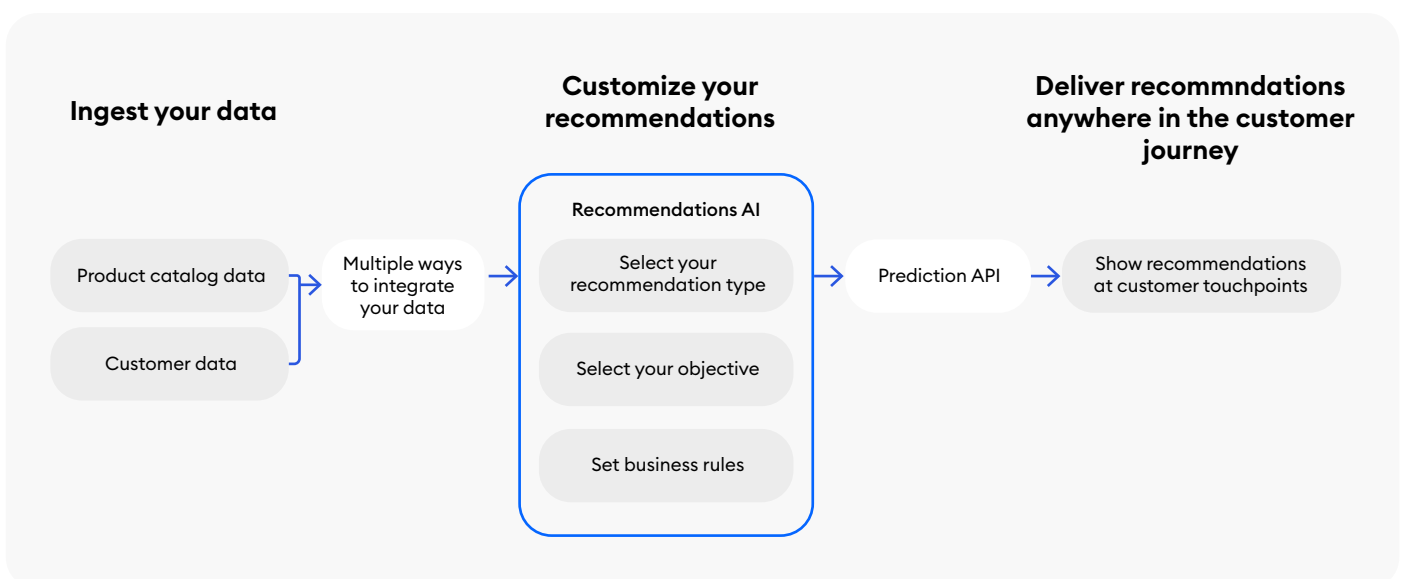
### Tools to use: Recommendations AI, Dynamic Yield, Recombee

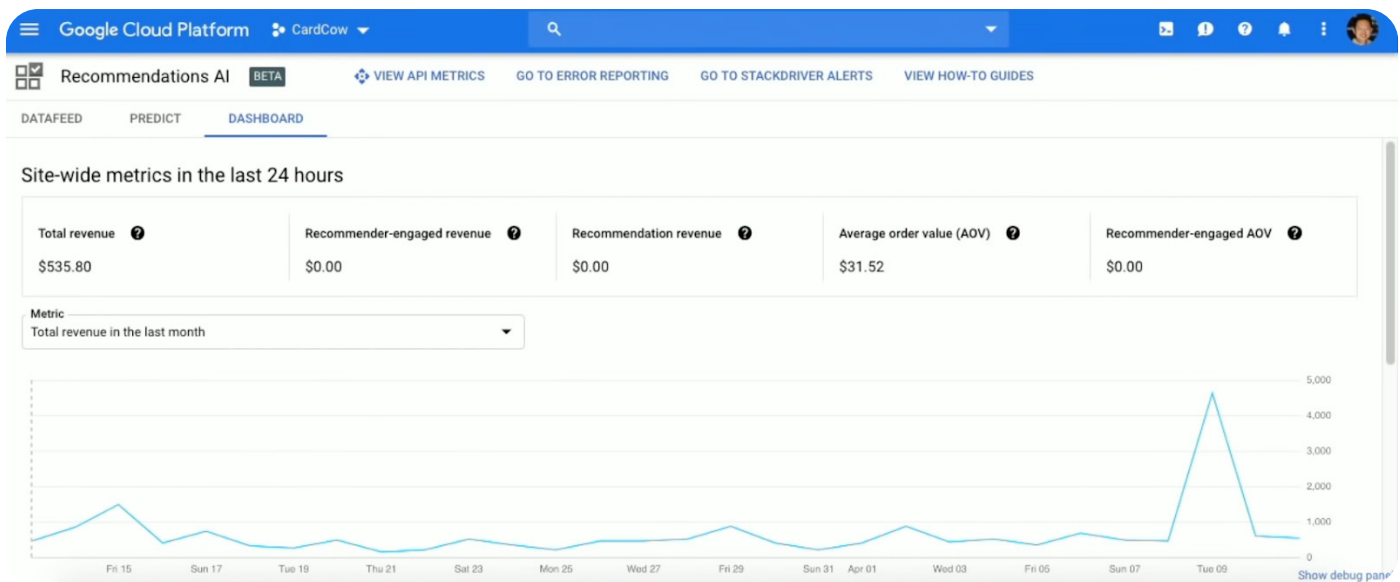
Recommendations AI uses Google's latest machine learning architecture and matches suggestions to your visitors' searches. This means that you don't have to preprocess data or train machine learning models, it's done automatically for you.

You can incorporate your product names, descriptions, categories, images, as well as apply business rules to customize the view for your shoppers. This will help you present the recommendations in an intuitive graphical user interface

So, to **implement Recommendations AI** follow these steps:

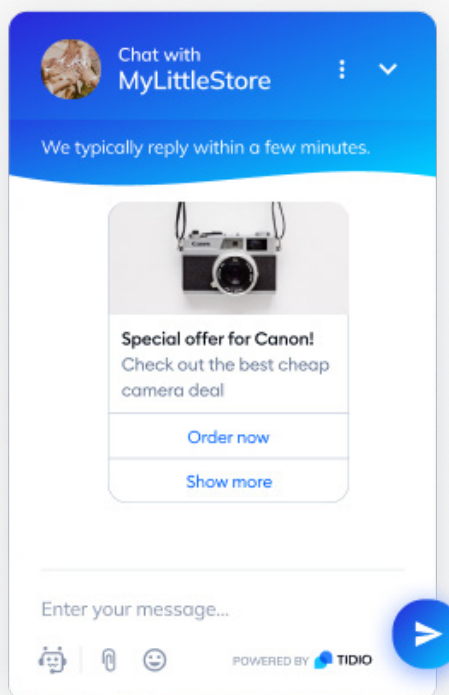
1. Set up a Google Cloud project and create authentication credentials
2. Import product catalogs individually or in bulk
3. Record user events in real time
4. Choose the types and placements of the recommendations panel
5. Provide historical user events as training data
6. Create and train your initial model
7. Preview the recommendations to check functionality
8. Evaluate the model according to metrics





## Pro-tip

You can also use a chatbot that provides pre-set recommendations to your website visitors. And all you have to do is click on the template Product recommendation and customize it with your text and images.



Onboarding new customers can be repetitive as most of the questions are similar, but the process requires a lot of time. So, automate the mundane tasks of the onboarding and focus on the fun part that help you get to know your clients better.

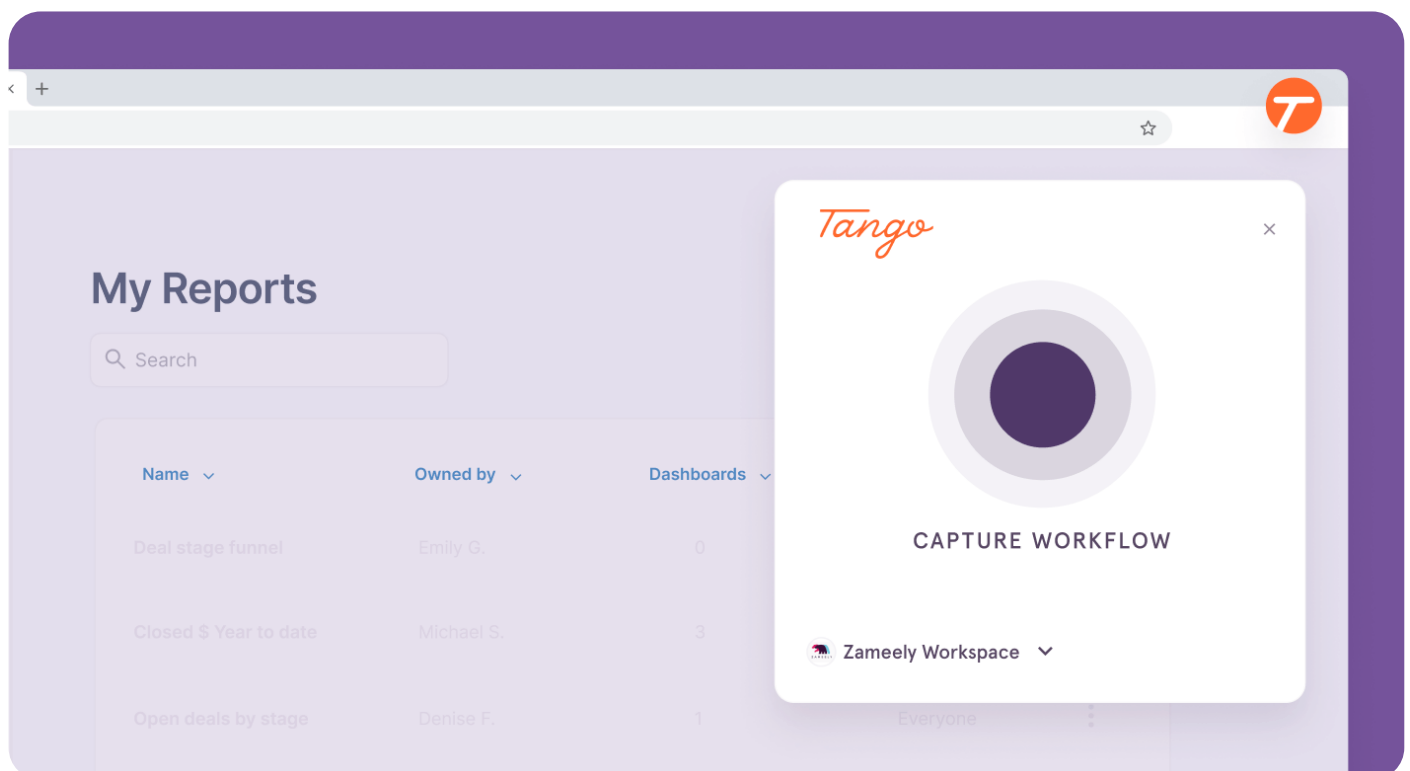
Artificial intelligence is there to help you with that.

### **Tools to use: Whatlf, Tango**

Tango is a simple tool that you can use to create how-to guides. This platform saves you time and effort, so you can focus on growing your business instead of setting up onboarding calls all day long.

To onboard customers using Tango:

1. Download the software and add the extension to your browser
2. Go to the area you need to explain
3. Click on the extension to start recording
4. Go through the step-by-step process
5. Stop recording when you're done



Tango will automatically take care of documenting, cropping of the screenshots, adding annotations, and more. You can then blur out sensitive information, add the logo and change colors to further customize the finished product.

# Track deliveries on autopilot

## Strategy 9

“Where’s my package?” is one of the most common questions customer service representatives face on a daily basis. And in the times your agents are not available, the clients might be getting anxious about their order’s whereabouts.

But artificial intelligence tracking is here to help. Using this technology you can let your customers track their package automatically. All they need is a tracking number.



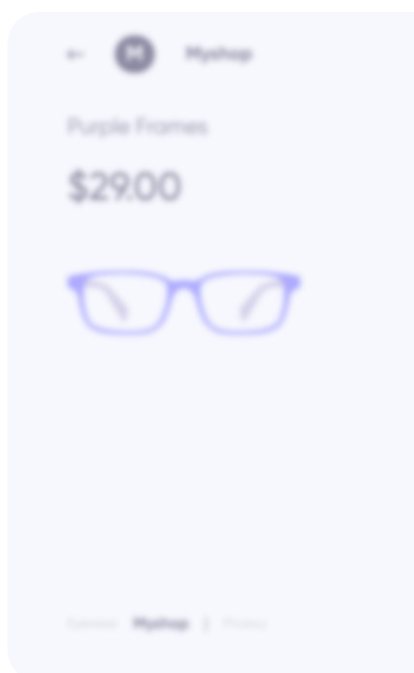
### Tools to use: [Ordertracker](#), [Shopify Track with Shop](#)

Let’s take Ordertacker as an example of a tool you can use for automatic package tracking. This tool was created for the users to make tracking the delivery hassle-free, which your clients will definitely appreciate.

And once added to your site, your clients will be able to see where their delivery is by imputing a tracking number to the platform. This universal system can track parcels from any post office by tracking number look up from over 1200 international couriers.

**Add Ordertracker system to your website** by following these three steps:

1. Create a tracking page
2. Install the software on Shopify or use JavaScript widget for any other website
3. Add a package tracking Iframe
4. Analyze different couriers’ performance



#### Your package was delivered in 9 day(s)

Delivered on Tuesday, April 12, 2022

Apr 4, 2022 21:43

**Your package is in transit with the carrier.**

Paris, CDG, FR 95700

LA POSTE FRANCE



Apr 4, 2022 18:06

**Your parcel has arrived at a transit centre, it is on its way.**

Roubaix, FR 59100

BELGIUM POST



Apr 4, 2022 08:01

**Your package has been picked up by the carrier.**

Brussels, BE 1200

BELGIUM POST



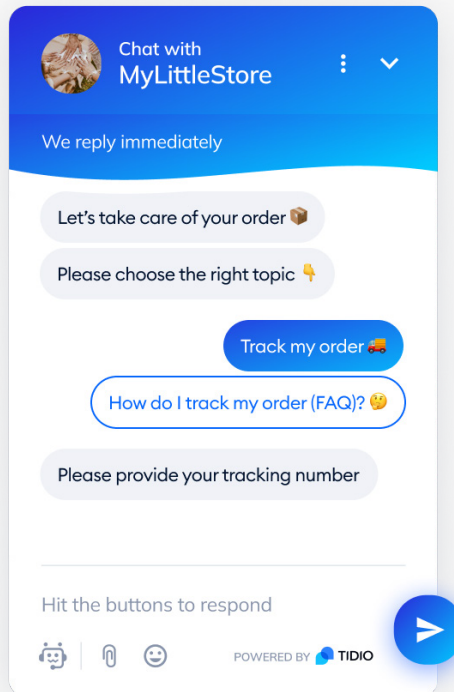
Apr 4, 2022 03:00

**The carrier has been informed and will soon collect your package.**

Brussels, BE 1000

## Pro-tip

If you're a Shopify merchant, you can enable customers to check their order status using chatbots by providing their order number or email address. The bot reads the statuses from your Shopify panel for orders placed within the last 60 days.



## Process returns

### Strategy 10

Returns can be frustrating for all parties involved.

The client wants the right product, and you want the completed sale. But none of these are happening if the item gets returned and refunded. So, ensure this process goes smoothly and encourage the client to give your business a second chance. This way, your company might gain a loyal customer instead of an unhappy shopper.

Your customer support team can also use AI to streamline returns and cut down workload by automating manual tasks. This will ensure your representatives' don't burn out at work as well as improve the shopper's experience.

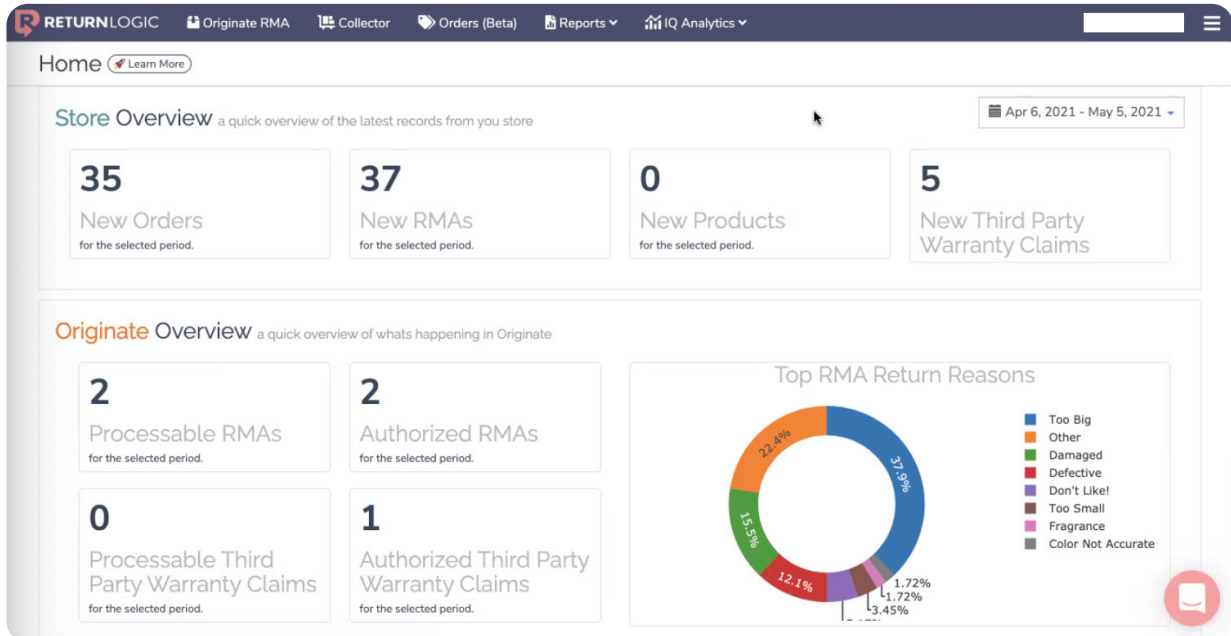


### Tools to use: WhatIf, Tango

With ReturnLogic, artificial intelligence takes care of the returns according to the set rules. The system also provides dashboards for a clear view of your orders, refunds, and reasons for customers returning the products.

## So, to **automate your returns process**:

1. Integrate your Shopify website to the system
2. Set up product rules
3. Choose a return window
4. Create exchange types
5. Pick exchange product exclusions
6. Add a return shipping address
7. Fill in support information
8. Set notifications for customers
9. Add return reasons



## Pro-tip

You can use Tidio live chat to cancel orders, process returns, and request refunds during the conversation with the customer. Or you can use the Visitor says node to enable customers to request refunds through the chatbot.

The image shows the Tidio chatbot configuration interface on the left and a live chat window on the right.

**Configuration Interface:**

- Trigger:** Visitor says
- Description:** The visitor will be able to launch this chatbot on their own, by sending a message that includes recognizable phrases. Once triggered, the chatbot will take over the conversation.
- Conversation language:** English
- Conversation topic:** Custom
- Instructions:** Type in what a visitor can say to trigger the bot. Use the most natural language possible.
- Triggers:**
  - How to submit the refund?
  - Can I request a refund?
  - What else can the visitor say?

**Live Chat Window (Chat with MyLittleStore):**

- Message:** Hello, can I get my money back?
- Response:** If you're looking to return or exchange your order for whatever reason, we're here to help! We offer return within 30 days of purchase. You can return your product for store credit, a different product or a refund to the original payment method.
- Response:** Please submit the request through our formt [www.form-refund.com](http://www.form-refund.com) We will get back to you with the
- Input:** Enter your message...
- Footer:** POWERED BY TIDIO

# Conclusion

And there you have it—the best customer service automation strategies, so your business can become even more efficient at supporting clients.

These will help your human agents regain their time and be more productive while, at the same time, improving the customer experience. No need to manually handle FAQs, organize requests, process refunds, or track deliveries. AI can handle all of these tasks for you.

Using artificial intelligence can benefit your customers because they'll get instant replies and solve their problems in no time. It will also give them more power as they can perform more tasks in the self-service portal. On top of that, you can improve your brand image and people's opinions about your business without much extra investment.

Win-win situation.

So, pick and choose whichever tactics your company needs and enjoy the benefits.