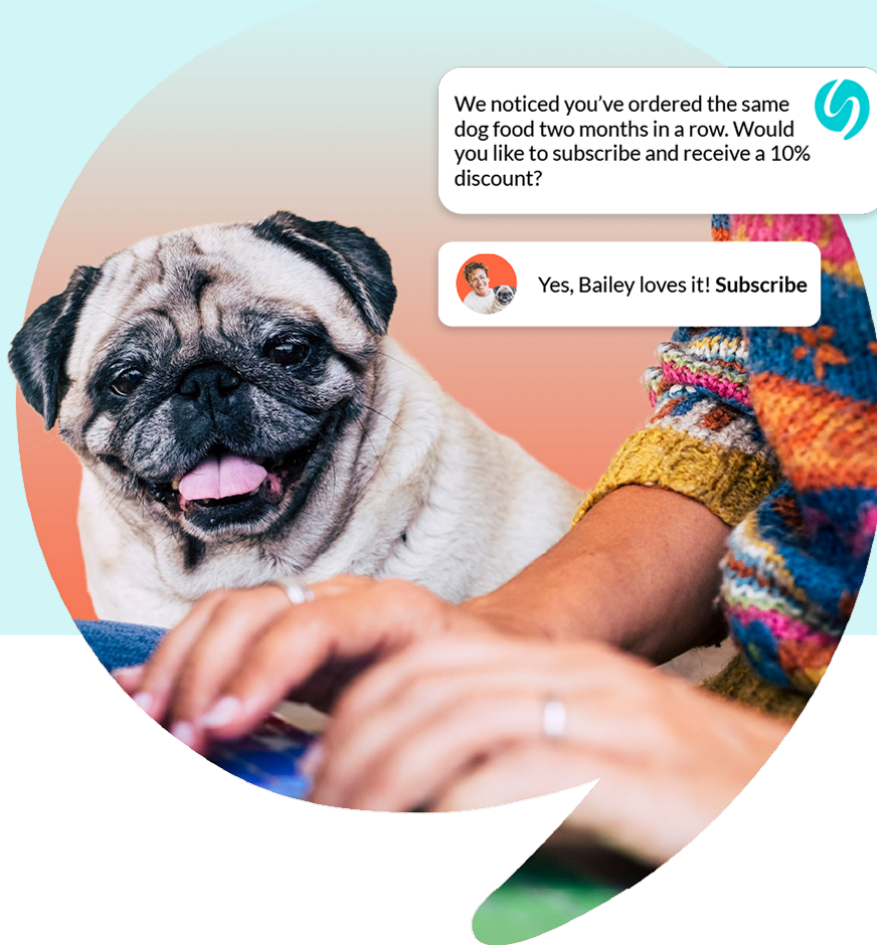


Linc

Checklist for Choosing the Right AI Chat & Customer Service Automation Solution



For today's digital commerce brands, the competition to create memorable customer experiences is fierce.

It's crucial to establish personalized, smooth interactions between your brand and customers. Strategic investments in AI Chat and Customer Service Automation are essential to achieve this.

By improving the buying experience with better self-service options and personalized customer assistance, AI Chat and Customer Service Automation boosts revenue and enhances customer loyalty.

With so many solutions on the market, we've put together your checklist for cutting through the noise and selecting the AI platform that's best suited for your needs as you evolve your customer experience strategy.

Let's get started.

What is AI Chat & Customer Service Automation?

AI Chat and Customer Service Automation streamlines, automates, and enhances every chat interaction between your brand and your customer. By automating conversations and key business processes, your customers get the consultative help they need across chat channels from first touch all the way to resolution.

Chatbot vs. AI Chat – how they’re different

Think about the last time you visited a chat on a website to make a purchase. Were you greeted by a chatbot? Did it surface a laundry list of items that didn’t quite answer your question, leaving you frustrated and redirected to another support channel?

That’s because traditional chatbots don’t meet the needs of the modern customer. Instead, they provide rigid, impersonal customer assistance and use pre-programmed responses based on specific inputs or keywords they receive. They don’t meet the conversational standard of live chat but don’t solve the needs of a chat on a website, either.

CHATBOTS	AI CHATS
X Pre-programmed responses	Understand context
X Poor conversational output	Handle complex conversations
X Don’t evolve	Learn from past interactions

AI Chats, on the other hand, are sophisticated. Think of them as the 1994 Rothschild Bordeaux to the Franzia boxed wine that are traditional chatbots. AI Chats rely on language models and deep learning to understand, learn from, and respond to customers in real-time.

The biggest difference between the two? AI Chats understand context and interpret the intent of the user, handling complex conversations much more effectively. They also learn from past interactions, improving accuracy and responsiveness over time. Chatbots simply don’t.

Where AI Chat and Customer Service Automation intersect

When woven into a tight customer service workflow, AI Chat is a powerful lever to improve customer satisfaction and loyalty. Moreover, solutions that incorporate generative AI to provide enriched responses in real-time can play a big role in achieving the hyper-personalization today’s customers want.

Getting Started: How to Effectively Evaluate An AI Chat & Customer Service Automation Partner

Define which channels are the highest order of priority.

Before taking the first step into buying a solution, you must know what problems you are solving for. Here's where understanding what is the biggest gap in your customer service beyond hunches and guesses is critical.

ASK QUESTIONS LIKE:

- What are the most common queries from customers?
- What are the common challenges faced by the sales and customer service teams?
- Which channels are receiving the highest volume of requests?
- Where is ticket volume driving down efficiency the most?

From here, you can understand the highest-order priorities to tackle, and the channels that are most important to target. As an example, if high ticket volumes are a problem, and your live agents don't have enough capacity to resolve them, that may be a sign that your chat channels are the first place to triage.

Determine if the platform is industry-specific.

Industry-specific, or vertical AI, plays a big role in helping you drive more focused results. These types of tools bring a targeted focus on a niche business problem area with pre-built automation to act quickly. This means the entire suite of AI drives better outcomes, faster.

ASK QUESTIONS LIKE:

- Do you have any pre-built automation for [insert specific use case]?
- How customizable are the automation capabilities, and how long do they take to go live?
- In addition to chat, does your platform offer an AI virtual assistant for agents and customers?
- In what ways is the platform designed to meet the demands of digital commerce?
- Walk me through a customer journey and how your platform enhances each step.

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Select a customer service platform that goes beyond support.

Work with customer support partners that don't just target routine customer service tasks, but that can integrate higher-order strategic elements that are part of your CX strategy. For example, select the platform that leverages conversational and generative AI to help customers find what they need and receive recommendations to enhance the buying experience.

ASK QUESTIONS LIKE:

- In addition to chat, does your platform facilitate consultative selling?
- Do you have a generative AI component to your platform? If so, how is it used?
- Do you offer an order-tracking experience that surfaces personalized recommendations?



Probe for pre-trained AI & accuracy.

AI that has been pre-trained on the needs of today's digital commerce brands drives more value. Pre-trained AI enables customer needs—such as finding a specific type of product or resolving an order issue—to be achieved faster and more accurately. Typically pre-trained AI also means it has greater accuracy. That's because the AI has had more time to learn from, interpret, and improve its outputs based on the data sets it has been given.

ASK QUESTIONS LIKE:

- What metrics can you provide to demonstrate the AI's understanding and response accuracy to customer queries?
- On what kind of data was the AI trained? How relevant is it to our specific industry and our customer's common inquiries?
- How well does your AI solution integrate with our existing CX platform?
- Is there a possibility for the AI to be further trained or fine-tuned on our specific data to improve its performance and relevance?
- How does your AI ensure data privacy? Are customer interactions stored or anonymized, and how is this data handled?
- Does your platform use dialogue flows? **(if yes, that means getting set up will require a more time-intensive configuration. When AI is used to define how to resolve a customer issue, it's faster and can make improvements over time.)**



Ensure the platform is designed to reach final resolution on support tickets.

Many customer service platforms focus on quickly answering customer questions. However, they often overlook how customers seek help in different ways and for different issues, often reaching out across various channels in a dispersed manner. As a result, customers are often redirected instead of getting the specific help they need.

ASK QUESTIONS LIKE:

- Does your platform allow customers to easily resolve issues even if the first touch was on a different channel?
- How do you create a holistic experience for shoppers?
- How is redirection minimized with your platform?
- What does the post-order experience look like?



Vet out vendors for fast and simple implementation & integration.

This one is straightforward—the only way to know if it's a truly fast implementation is by asking the right questions.

ASK QUESTIONS LIKE:

- Can you show me an anonymized implementation timeline process you used recently?
- How many team members are typically required on our end to ensure that we hit our target go-live date?
- How many dedicated resources from your end will we have to make that happen?
- What are some common roadblocks that get in the way of going live in the timeframe you are promising we will?



Vet out the expertise of the team.

Ensure that the team you engage with is a team you envision collaborating with for an extended period. It is important to partner with a vendor who goes the extra mile to introduce you to the individuals you will be working closely with daily. By doing so, you can establish a solid understanding of the team's capabilities, expertise, and dynamics, making a more informed decision on a long-term working relationship. This level of transparency and connection helps ensure compatibility and promotes successful collaboration over time.

ASK QUESTIONS LIKE:

- What is your approach to communication and collaboration with clients throughout the partnership lifecycle?
- Can you describe your team's expertise and experience in our industry or specific areas relevant to our project?
- How do you handle potential conflicts or challenges that may arise during a partnership, and what steps do you take to ensure a resolution?

About Linc

AI Chat & Customer Service Automation
Built for Digital Commerce & Retail

Linc automates conversations and key business processes with AI, enabling customers to get the consultative help they need across channels from first touch all the way to resolution—all so that you never face churn at the hands of a poor customer service experience again.

Unlike other technologies that require time-intensive configurations and stop at chat, Linc's AI engine is designed to resolve specific digital commerce issues and offers consultative selling, enriched conversations via LincGPT, real-time order tracking, holistic order support, and more to foster customer loyalty.

WITH LINC, YOU GET:

- 24/7 customer assistance
- AI Chat
- Consultative selling enhanced by LincGPT
- Post-Purchase Portal
- AI-powered digital workers
- Customizable automation for your unique needs

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