

The Role of Automation in Care

Khoros compiled tips from the following experts from a session at [Khoros Engage](#).

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Why Automation in Care is Useful

Automation offers brands many low-risk opportunities to provide a better customer experience, so even hesitant brands can experiment. Automation is more than just chatbots (which are valuable in their own right) – it also includes various other ways of streamlining interactions between brands and customers on communication channels. It can make your customers feel welcome even when live agents are offline by giving the impression of 24/7 care. Whether or not your brand uses a form of automation yet, considering how the technology can fit into your organization as a whole, and your care program in particular, is valuable.

Here are eight tips from experts at Khoros Engage to help incorporate automation into your brand's care program:



1. Set automation goals

There are two important goals that any automation program should include. First, the program should aim to provide a better customer experience. Second, any automation program should aim to make human agents more efficient, thereby reducing the cost of customer care.



2. Start small

If you're just beginning to use automation in care, choose one thing to automate and grow from there. Automation requires a lot of data to be accurate, so you need to build up to more complicated interactions. With automation, it's more difficult to start big and scale back than it is to begin small, learn what your customers are coming to you for on messaging channels, and build toward streamlining those interactions with automated elements.



3. Onboard a chatbot like you would an agent

Slowly add more responsibilities on the plates of automation and chatbots. Chatbots, like agents, need to grow into their world. Have chatbots start small – by welcoming a customer on a messaging channel, for instance – and then expand their responsibilities. This will help ensure you maintain quality customer service while gradually adding more automation.



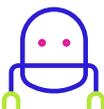
4. Think creatively about when to use automation

Beginning every care interaction with automation might not be the best use of the technology for all brands: Instead, using automation in the middle of an interaction to take care of repetitive, mundane tasks might be more effective. For example, customer identification is a task that automation can handle really well. In cases where you haven't heard back from a customer on a messaging channel, a chatbot can reach back out and let them know the care team still wants to help and is still available.



5. Use automation as triage

Letting automation handle initial customer triage is a smart way to begin to incorporate the technology into your care program. When a customer initiates an interaction, a bot can respond by greeting them and asking a few questions so that when an agent enters the conversation, the care topic has been narrowed down. Or, you can begin the interaction with an agent and then use process automation in the middle if you need to do an information exchange or verification, freeing the agent to perform more complicated interactions. In this case, automation levels up the agent's work rather than replacing it.



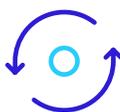
6. Think beyond chatbots

There are several ways that automation and bots can streamline conversations with customers while also reducing the amount of time an agent needs to be involved in the conversation without automating the chat. For instance tagging, prioritizing, and routing certain customers are all tasks that automation can handle and that add value without a public-facing chatbot.



7. Consider the customer experience

Chatbots usually interact with customers over private messaging channels, but not all customers begin their interaction with your brand privately – some customers begin their interaction on a public channel and then move to a private channel for more care. With these customers, you don't want your chatbot to greet them as if they're new, because they've already been messaging with someone from your brand. Instead, you want the chatbot to continue the conversation seamlessly.



8. Containment rate isn't the only important metric when measuring automation value

Containment isn't the only way to measure the value of automation. Even if the containment rate is lower for some interactions, automation might have made the interaction more efficient. When automation takes over for an agent, that agent can then spend more time resolving higher level issues.

About Khoros Engage

Khoros Engage brings together digital customer engagement leaders. Attendees hear from thought leaders inspiring them to bring their business to the next level, gain insights from brands and industry leaders on digital care, community, and marketing topics, and build a network of other digital leaders.

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