

A MOTII RESEARCH REPORT

The human in the loop

Where businesses want AI in their customer conversations, and where they don't.

MOTII

1,000+

Implementations delivered

4.9

Star Rating

Where should AI sit in a customer conversation?

AI is changing the way businesses manage sales and customer service. The technology is evolving quickly, and there is no shortage of advice about how AI agents can answer questions, reduce response times and take pressure off busy teams.

Almost everything published about these tools, however, is written for high-volume ecommerce businesses: thousands of near-identical enquiries, large customer service teams, an obvious deflection metric and value that can be demonstrated within a fortnight.

Very few Motii clients look like that. They sell considered, often high-value products and services, with long sales cycles and expert people in the middle of them. Customer questions are not always straightforward, and the people involved play an important role in building trust and understanding what the customer actually needs.

Through our work with Fin, Intercom's AI agent, we wanted to better understand where businesses like these genuinely want AI involved. Which conversations could it handle? Where could it support the team? And where should a person always remain involved?

So we asked. We interviewed the people responsible for sales and customer service across a group of Australian businesses. Every business we spoke with runs a CRM, and several already use AI extensively inside the business. At the time of the interviews, however, none had an AI agent speaking directly with their customers.

This report shares what we heard. It is not intended to make the case for replacing people with AI. It looks at where AI could remove repetitive work, help customers get answers sooner and give experienced staff more time for the conversations where they add the most value.

76%

of Australian service leaders say customer-facing AI is a top investment priority for the next six months.

Salesforce

The investment is coming. The harder question is where it should sit in the customer journey.

A NOTE ON METHOD

Participants were promised anonymity. Their quotes are included exactly as provided and are not attributed to individuals or businesses.

The biggest question was not what AI can do.

It was where businesses were comfortable using it.

100%

OF PARTICIPANTS

drew the same line, in the same place, unprompted and in near-identical language. Not one of them had written that policy down.

AI is welcome to do the work either side of the customer conversation, including defined, repeatable interactions. The conversations where trust, expertise and judgement matter has to stay human. This is not hesitation about the technology. It is a decision about what they sell. Several of these businesses already use AI heavily behind the scenes, across file notes, document analysis, quote generation and hundreds of internal automations.

WANTED FROM AI

- ✓ Capturing enquiries at 10pm
- ✓ Asking qualifying questions
- ✓ Chasing outstanding documents
- ✓ Routing to the right person
- ✓ Following up on stalled items
- ✓ Handing over cleanly

KEPT HUMAN

- The sales conversation itself
- Re-engaging past customers
- High-touch account management
- Diagnosing what a customer really needs
- Anything requiring physical attendance

"Our customers come to us because they often say things like, you get us. There's a human always at the end that they can reach if they need to."

Conversational quality matters less than the quality of the handover.

Speed is not the problem

We began assuming response times were the main pain point, expecting an agent to fix them by acting faster. That assumption did not survive our interviews.

The participant with the largest service team responds to standard enquiries within four hours, and faster for simple status questions. That is good service by any measure, yet they still want an agent.

The real cost sits elsewhere. It is that people with deep technical knowledge spend much of their day answering questions that have a single, fixed answer. Where response times are already acceptable, these tools are not buying speed. They are recovering expert capacity.

85%

of the people we interviewed named repetitive questions as a drain on expert capacity.

Motii interviews

85%

of service leaders are expanding human agent responsibilities as AI reduces routine contact volume.

Gartner, 2026

"We want the tech to make the customer experience better, not impersonal. Faster and better, and in addition to having a human help them, not instead of."

"Our customers come to us because they often say things like, you get us. They want that higher-touch solution. There's a human always at the end that they can reach if they need to."

THE HUMAN IMPACT

Automation didn't replace the team. It changed what the team had time to do.

As support demand at Fin grew roughly 300%, automation helped handle the increased volume. Rather than removing people, the capacity gained shifted towards higher-value, consultative customer work.



"We wanted to add more value to the customer through the humans that we had in our team."

Declan Ivory, VP Customer Support, Fin on The Motii Playbook

After-hours enquiries decay in minutes

Participants raised this unprompted in most interviews, describing an identical pattern. An enquiry arrives at nine or ten at night from someone on their phone after work. It receives a reply the next business day, when the lead has already gone cold.

Our interviewees described two core causes. First, simply forgetting: prospects move on and forget submitting the form. Second, competitive loss. One participant estimated a three-minute window before a lead's attention is actively diverted to a competitor.

72%

of the businesses we spoke with identified after-hours enquiries as an opportunity.

Motii interviews

This is the clearest measurable opportunity in our report. Most businesses know their after-hours enquiry volume and conversion rate. Comparing that against business-hours performance defines the opportunity.

"If they click on our ad, they'll be seeing six of our competitors within the next ten minutes as they continue to scroll."

CAPTURE IS ONLY HALF OF IT

Every person we interviewed believed that if an agent ran deeper qualification through the chat widget, going beyond name, address and phone number, their sales team would be better prepared for the first call. Capture solves the timing problem. Qualification solves the handover.

100%

of interviewees expected better-prepared first calls from deeper chat qualification.

Motii interviews

~50%

close rate reported by early Fin sales agent customers on leads Fin qualified and handed to human account executives.

Intercom

In long-cycle businesses, support is mostly status-chasing

Where delivery runs over months, customers are often checking on progress rather than asking about the product. Participants described the same remedy: give customers a clear view of the current stage and expected timeline.

Most delays were caused by waiting on third parties or customer paperwork. The service is often invisible rather than slow, making progress visibility more valuable than faster answers.

This is less about conversational intelligence and more about data readiness. An agent can only answer reliably if CRM data is complete and current, the customer is correctly identified, and clear rules define what can be shared and when a human should take over.

WHAT CUSTOMERS ASK

"Where is my order up to?"

"Has the paperwork come back yet?"

"When is it likely to be finished?"

"Who is handling this now?"



WHERE THE ANSWER ALREADY SITS

Deal or project stage in the CRM

Document status fields

Scheduled activity dates

Record owner

44%

Salesforce

Disconnected systems are holding AI back.

44% of businesses using AI say technology silos have delayed or limited their AI initiatives. When customer data is spread across systems that don't communicate, AI may not have the complete picture it needs.



MOTII INSIGHT

A status question is a symptom, not a request.

Customers do not want a progress update so much as reassurance that they have not been forgotten. The fix is visibility, not speed.

The revenue nobody is collecting

The same gaps came up repeatedly: finance, insurance, service agreements, extended warranties, satisfaction check-ins and onboarding after a six-figure purchase. Nobody we spoke with considered these unimportant. They are limited by administrative capacity. The intent is there, but the hours are not.

Finance and insurance
attach

Service agreements and
extended warranties

Satisfaction check-ins and
onboarding

"Everyone's very happy to go and sell something in the first place, but then the follow-up for the second and third time ... that is very much lacking. You're always chasing the shiny thing down the road."

Most business cases for AI begin with cost reduction, such as replacing an agent to save a salary. For businesses like these, that calculation is difficult to defend. The stronger case sits on the other side of the ledger, in the attach revenue that is currently going uncollected.



The gap after the sale is bigger than the saving before it.

In every business we looked at, the number of closed deals that should have had a finance conversation, a service plan or a check-in was substantially larger than any headcount saving an agent could produce. It is also a number nobody argues with, because it describes revenue the business already earned the right to ask for.

This is the one place in the customer journey where nobody drew a line. Every other opportunity came with a caveat about protecting the relationship. Post-sale follow-up came with none, because the conversation is not happening at all today. There is no relationship to put at risk, only silence to replace, which makes it the least contested place to start and the easiest to measure afterwards.

Where businesses drew the line

Participants named their exclusions faster, and far more precisely, than their opportunities. That is a useful signal in itself. They know exactly what they are protecting.

Re-engaging past customers

Reactivating a former client stays with the original salesperson. Relationship equity is an asset that automation degrades.

High-touch account management

Kept strictly human. For these businesses it is not a service layer, it is the product.

Physical diagnosis or attendance

An agent can capture the detail and route it, but it cannot fix anything. One participant still valued a clean, structured fault report before sending a specialist out.

Working out what the customer needs

Customers routinely ask for the wrong specification. Only an expert asking the next question gets to what they actually need.

These four have something in common. Each one is a judgement call, and each one is where the value of the relationship sits.



Disclosure is contested

This was the only question where participants disagreed with each other. Three distinct positions came up, with no consensus between them. That matters, because a business that has not made this decision will inherit whatever the software does by default.

DISCLOSE

One participant wants the agent to introduce itself as AI immediately, and treats that as a trust-building move rather than a disclaimer.

DO NOT

A business described to us second-hand runs an undisclosed agent, apparently happily. The giveaway is customers turning up in person to speak with staff who do not exist.

IN BETWEEN

No pretence that the agent is human, no announcement either, and a person one click away the moment anyone asks. Most participants sat closest to this position without ever naming it as a policy.

"If they were speaking to a robot, they wouldn't like it. But on the other hand, they're very bad at detecting what is AI. So if you couldn't really tell, it'd be great."



The disagreement is about the customer, not the technology.

Every position we heard started from the same question: what would our customers think if they found out? Businesses selling on relationship worry that disclosure signals distance. Businesses selling on transparency worry that silence signals something worse. Both are right about their own customers, which is why there is no single correct answer.

Whatever you decide, decide it. Do not let a vendor default make this call for you, and keep an eye on where the regulation is heading.

Knowledge that was never written down

Every interview reached the same constraint, regardless of budget or appetite. An agent is only as good as the knowledge behind it, and that knowledge tends to sit with senior staff, who have the least time available to record it. In our experience this stalls more implementations than any technical issue. It is unglamorous work, and it is the work that determines whether everything after it succeeds.



"Everyone's talking about it, and the only person that would be able to implement anything is me, and I'm a bit busy."

"I've been with the company twenty years, so I'm just sort of getting everything out of my brain and onto a document."

One participant has already solved it

Rather than writing a knowledge base upfront, he gave his staff an internal assistant. The team asks it, then answers the customer in their own words. Four things follow.

Answers get verified first

Your experts see the answer before the customer does, and correct it on the spot.

Gaps surface themselves

When it cannot answer, it routes the question to a person and logs the gap. He has thirty banked.

The big job gets small

Documenting twenty years fails as a project. Writing thirty real answers at a time works.

Data before spend

He knows one in five enquiries were already answerable, because he measured it live.

One key learning.

His assistant returns three formats per question: a full answer, a ready-to-send email, and a short summary. Staff use them without editing. One caution from the same business: he pointed a second assistant at his live website and it kept quoting a site replaced weeks earlier. Build the knowledge base separately from any site migration.

Six questions worth answering before you choose a platform

If you can answer all six, you are ready to look at platforms. If you cannot, you have found your starting point. None of these are technology questions.

01

What proportion of your enquiries have an answer that already exists somewhere?

02

Where does that answer live: a document, a system, or one person's head?

03

What happens to an enquiry that arrives at 9pm on a Friday?

04

How much of your most experienced people's week goes on questions with a fixed answer?

05

What should happen after a sale that currently does not?

06

If a customer asked "where is my order up to" right now, could anything other than a human answer them?

Everyday software, turned into a revenue engine

Motii helps businesses connect their CRM, sales, marketing and operational tools into one connected system. We design, implement and integrate technology around the way your business works, reducing manual admin, improving visibility and helping your team get more from the tools you use.

1,000+

Implementations
delivered

4.9

Star rating

4x Pipedrive Partner of the Year



Want to work out where AI fits in your business?

We will look at your enquiry flow, your CRM data and your knowledge gaps with you, then tell you honestly what is worth automating and what is better left alone.

Book a Call



The Motii Playbook

Hear the full conversation. Fred Schnell talks to Declan Ivory, VP of Customer Support at Fin, about running support at 83% automation and why the human phase matters more than ever.

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