

Proactive by Design

A short, punchy e-book for
turning post-purchase chaos
into customer love.

Who this is for

CX leaders, COOs, VPs
of Ops, and founder-led
DTC teams.

Outcome

Fewer tickets,
happier customers,
smoother ops.

Read time

~25 minutes.



1

The New Rules of Post-Purchase

Customers expect the same energy *after* the buy button as before it. When brands wait for “Where is my order?” (WISMO) to roll in, they bleed loyalty and margin.

The fix isn’t more agents; it’s a proactive operating system that finds and fixes issues before customers feel them.

Why this matters now

A big share of shoppers are disappointed with post-purchase and only a minority feel cared for after the sale.

A single bad delivery or support experience can switch off future purchases.

Giant marketplaces have set proactive expectations; everyone else gets compared to them.

The promise

Move from break-fix to predict-prevent and turn the post-purchase window into a loyalty engine.



2

Reactive vs Proactive (at a glance)

Dimension	Reactive	Proactive
WISMO	Customer asks, agents scramble	Milestone-based updates & delay alerts auto-sent
Exceptions	Found days later via angry tickets	Detected in real time, auto-resolved or routed
Helpdesk	Ticket treadmill	CX hub for high-value outreach
Tech posture	Siloed tools, manual swivel-chair	Orchestration layer + agentic AI
Result	Churn, cost, burnout	Loyalty, efficiency, calm

TL;DR

Proactive ops **deflects** repetitive tickets (WISMO ~1 in 6), **accelerates** remedies, and **elevates** humans to the work that builds trust.



3

The Orchestration Layer (your nerve center)

A unified layer spanning:

order → fulfillment → shipping → delivery → returns → support.

It integrates OMS, WMS/3PL, carriers, CRM, helpdesk, and messaging—then **listens for exceptions** and **triggers actions**.

What it does

Ingests real-time signals

(payment, pick/pack, scans, exceptions).

Detects when something is off-track

(late ship, no scan, failed delivery, stock issue).

Fires automated workflows across systems

(notify, reroute, re-ship, refund, escalate).

10 high-leverage automations

- 1 **Ship-slip:** No scan > 48h → text + email delay notice; auto-expedite or re-ship.
- 2 **Lost-maybe:** In transit stall or delivered-but-not-received → verify + instant remedy.
- 3 **Oversold:** Past promised ship date with no movement → alternate FC/store fulfillment.
- 4 **Address fail:** Unverified address → customer self-fix link; hold & retry.
- 5 **VIP handling:** High LTV orders auto-upgrade shipping on first exception.
- 6 **Returns portal:** Self-serve labels, exchanges, and live status.
- 7 **Returns in transit:** Exchange item reserved; proactive “replacement on the way.”
- 8 **Failed payment:** Smart retries + customer prompt to update.
- 9 **Carrier disruption:** Weather/route issue → auto-switch carrier/route.
- 10 **Post-delivery care:** “Everything arrive OK?” survey + easy help links.

Build vs buy checklist

- Open APIs/webhooks, native carrier + 3PL connectors
- Real-time rules/alerts, exception dashboards
- Write-back to helpdesk/CRM, owned templates for SMS/email
- Role-based controls, audit logs, and sandbox to test workflows



4

Agentic AI (autonomy with guardrails)

Beyond rules, **agentic AI** behaves like a tireless teammate: it watches signals 24/7, plans multi-step fixes, executes across tools, and learns from outcomes.

Where it shines

Monitoring: Spots anomalies instantly (late scans, spike in delivery fails).

Micro-tasks at scale: Thousands of small checks/updates per minute.

Multi-system moves: Create re-ship in OMS, notify via SMS, note in helpdesk—without human swivel.

Personalized judgment: Bigger appeasement for VIPs or repeat issues.

Human-in-the-loop guardrails

- **Set policy caps** (auto-comp to \$X; above that, human approval)
- Create **explainable trails** (why the agent did X).
- Route **edge cases** to specialists.



5

Your Helpdesk, Reimagined

Automation takes the drudgery; humans take the moments that matter.

From ticket triage to proactive CX hub:

Repetitive questions deflected by tracking pages + notifications.

Agents focus on complex saves, consultative guidance, and surprise-and-delight.

New metrics: **tickets prevented, time-to-notify, CSAT post-delivery, customer effort.**

Proactive outreach plays

Pre-emptive delay note: "We've spotted a likely delay and expedited a replacement."

Post-delivery care: "Did everything arrive OK? Need help with setup or returns?"

Make-good moments: Auto-apply small coupon or shipping refund when thresholds trip.

Team upskilling: Train on orchestration dashboards, data cues, and empathy scripts.

New roles: Automation Specialist, CX Analyst, Escalation Lead.



6

Three Short Stories (inspired by real outcomes)

FashionCo (Apparel)

Problem: WISMO flooded tickets (holiday spikes).

Move: Orchestration + milestone SMS/email + auto remedies.

Result: ~40% fewer WISMO tickets; overall volume down; post-purchase CSAT up; repeat rate lifted for proactively updated customers

HomeGoodsInc (Home décor)

Problem: Frictional returns, heavy agent time

Move: Self-serve portal + automated labels/updates + smart exchanges.

Result: Returns tickets down ~60%; 40% faster refunds; retained/upsold a slice of would-be returns.

ElectroGear (Electronics)

Problem: Slow to detect firmware/quality issues

Move: AI “watchtower” scanning tickets/social/telemetry; instant guidance + engineering alert

Result: Incidents addressed in hours, not days; ticket spikes flattened; trust increased via transparent comms.



7

The 6-Week Quickstart (pilot to proof)

Week 0-1 - Baseline & Pilot

Quantify ticket mix (WISMO %, returns %, product issues %).
Pick 1 pilot flow (shipping delays) and 1 channel (SMS or email) to start.

Week 2 - Wire the data

Connect OMS ↔ 3PL/carriers ↔ helpdesk ↔ messaging.
Stand up a branded tracking page.

Week 3 - Exceptions & Playbooks

Define thresholds (e.g., no scan 48h; delivery fail once → trigger X).
Draft templates and compensation rules.

Week 4 - Automate First Moves

Auto-send delay alerts; auto-create re-ships under caps; log in helpdesk.
Add AI agent to monitor spikes and propose actions.

Week 5 - Helpdesk Shift

Retrain agents on proactive outreach; new KPIs; scripts.
Start VIP play (higher-touch remedies).

Week 6 - Measure & Expand

Report: tickets prevented, CSAT lift, repeat-rate deltas, \$ saved.
Expand to returns or product support next.

8

Readiness Checklist (mark what's true today)

- **Systems integrated** (OMS, 3PL/carrier, helpdesk, CRM, messaging)
- **Real-time visibility** (dashboards/control tower)
- **Automated notifications** (milestones + exceptions)
- **Exception playbooks** (delay, lost, wrong item, return)
- **AI/automation** in place for repetitive work
- **Self-service** tracking + returns portal
- **Team trained** on proactive mindset and tools
- **Cross-functional alignment** (Ops, IT, CX, Marketing, Finance)
- **KPIs defined** (contact rate/order, CSAT post-delivery, tickets prevented)
- **Governance** for AI caps/approvals/logs
- **Customer-centric policy** (simple, generous rules)
- **Scalable & resilient** under peak load



9

Risk Ledger (if you stay reactive)

Churn

One bad delivery/support moment can end the relationship.

Cost

Larger teams doing low-value work; burnout follows.

Brand

Public complaints compound; trust erodes..

Missed revenue

No proactive upsell/retention moments.

Fragility

Hidden issues snowball into crises.

Stagnation

No time or data to improve the system.

10

KPIs & Dashboards that Matter

Contact rate per order (down and to the right)

% WISMO of tickets (target steep decline)

Time-to-notify (from exception detection to customer message)

Tickets prevented (automation wins)

Automation resolution rate (% closed without human)

CSAT/NPS post-delivery (up and to the right)

Repeat purchase rate (lift for proactively updated cohorts)

ROI on a napkin

If you deflect N WISMO tickets/month at cost C each, that's $\backslash \$$ saved.

Add recovered revenue from higher repeat + lower churn.



11

Plug-and-Play Templates

Delay – SMS

Hey {{first_name}} – heads up: your order {{order_number}} hit a delay in transit. We've fast-tracked it and will update within 24h. Questions? Reply here.

Delay + Remedy – Email

Subject: We're on it: update for order {{order_number}}

We noticed a potential delay with your delivery. We've already {{action: upgraded shipping / shipped a replacement}}. Your new ETA is {{eta}}. As an apology, here's {{offer}} on your next order. You don't need to do a thing.

Lost-maybe – Email

We think your package may have gone missing. We've queued a replacement and flagged the carrier. If the original arrives, feel free to keep or return—your call. Thanks for your patience.

Post-delivery care – SMS

Your order was delivered !! Everything arrive OK?
If not, reply HELP and we'll fix it fast.

Returns – Portal copy

Start an exchange or return in 2 minutes.
No printer needed. We'll keep you updated each step.

12

Proactivity Maturity Model

- 1 **Reactive** – siloed tools, manual updates, ticket flood.
- 2 **Instrumented** – tracking page + milestone comms, basic rules.
- 3 **Orchestrated** – unified layer, exception playbooks, multi-system actions.
- 4 **Autonomous+** – agentic AI plans/executes; humans handle edge cases & relationship moments.



13

Glossary

WISMO:

“Where is my order?” inquiries.

Orchestration layer:

A control plane coordinating post-purchase systems and actions in real time.

Agentic AI:

Autonomous agents that monitor, plan, and act across systems within guardrails.

Tickets prevented:

Issues resolved before a customer needs to ask.

14

Your Next Moves

- 1 Pick a pilot (shipping delays) and one channel (SMS or email).
- 2 Wire the data; ship a branded tracking page.
- 3 Stand up three automations (delay alert, lost-maybe, returns portal) and one VIP play.
- 4 Change the team scoreboard to include tickets prevented and time-to-notify.
- 5 Report the win; expand to returns and product support.

Remember

Proactive ops are not a big-bang IT project—they’re a habit. Start small, learn fast, scale what works.



Appendix A

Sample Exception Thresholds

No scan within 48h of label creation → delay alert + expedite.

In-transit > 5 days domestic / > 10 days international → investigate + make-good.

Delivered status + no porch photo + customer says no delivery → instant replacement.

Return initiated + exchange chosen → auto-ship exchange before warehouse receipt.

Appendix B

RACI for a Proactive Pilot

Sponsor (R): COO / Head of CX

Automation owner (A): CX Ops lead

Integrations (C): IT/Engineering

Playbooks & copy (C): CX + Brand

Data & reporting (I): RevOps/Finance

Appendix C

Change Log (leave room to grow)

v1.0 – Shipping delay pilot live, 3 rules, SMS only.

v1.1 – Add returns portal, exchange auto-ship.

v1.2 – Introduce VIP policy and AI monitor.

Closing thought

The helpdesk of yesterday was a cost center.

The CX hub of tomorrow is your moat.

Proactivity is how you build it.