



Customer Service Automation

The SME guide to getting started with AI

converse
360



AI-powered automation can transform your business in many ways, but improving customer experience is where it delivers the **fastest, most measurable results.**

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Introduction

Why start with AI for customer service?

Boards and senior leaders are encouraging their teams to adopt AI and automation to drive efficiency, reduce costs, and enhance services.

The message is clear: get started soon or risk falling behind. But too often, leaders don't explain what they want to achieve, where the technology should be applied, or how it will actually help your business.

At converse360, we specialise in helping businesses to implement affordable, intelligent AI-powered automation that delivers in-person-like voice and digital experiences — extending your customer service to 24/7 without the complexity or cost you might expect.

Not sure where to begin? Start by asking the right questions to understand where your current business challenges are.

This guide will help you identify the best starting points for your customer service automation project.



By 2029, agentic AI will autonomously handle 80% of standard customer service issues, potentially reducing operational costs by around 30%

Gartner



Is this guide for you?

Take 30 Seconds to Find Out

This guide is designed for SME leaders who are experiencing at least one of the following situations:

- ☐ Your team is missing calls or enquiries because they're too busy or under-resourced
- ☐ You're losing sales opportunities when your office is closed (evenings, weekends, holidays)
- ☐ You're spending significant time answering the same customer questions
- ☐ Your current customer service channels are expensive to run or complicated to manage
- ☐ Customer satisfaction scores are slipping despite your team's best efforts
- ☐ You've been told to "implement AI" but don't know where to start or what will deliver ROI

If you ticked **one or more boxes**, this guide is for you.

Reading through the following pages will help you identify the most beneficial customer service automation projects for your business.

The Guide Covers **4 Key Areas**:

- **Your customer service needs** — understanding current volumes and costs
- **Identifying service gaps** — where are you losing opportunities?
- **Understanding where automation can help** — practical applications for your business
- **Using AI for knowledge retrieval** — connecting to your existing systems and data

First, Identify Your Main Challenges

The following pages outline the most common customer service challenges faced by small and mid-sized businesses. Usually one or two stand out as a priority, or there may be a combination you need to address.

Issue 1 | Resource Constraints

The Problem: Customers are trying to contact you, but you're under-resourced or too busy to respond. You're missing opportunities because your team can't handle peak volumes.

Common Signs: Calls going to voicemail, long response times to emails, customer complaints about accessibility.

Issue 2 | Channel Limitations

The Problem: Your current channels are complicated to use, expensive to run, or not meeting customer preferences. You're missing sales opportunities or failing to resolve support issues effectively.

Common Signs: High abandonment rates, customers asking for alternative contact methods, channel costs eating into margins.

Issue 3 | Customer Experience Falling Short

The Problem: You need new and improved ways to engage with customers that better meet their expectations. Today's customers expect instant, personalized responses at any time.

Common Signs: Declining satisfaction scores, losing customers to competitors with better service, feedback requesting faster responses.

Issue 4 | Service Level Breaches

The Problem: You're not meeting your service level commitments. You're missing support calls, breaching SLAs, or making customers wait in long queues.

Common Signs: SLA penalties, formal complaints, team stress and burnout, damage to reputation.

Issue 5 | Providing Customer Choice

The Problem: Customers want to reach you by phone, email, webchat, WhatsApp, or all of the above. Managing multiple channels manually is overwhelming your team.

Common Signs: Inconsistent service across channels, enquiries falling through the cracks, difficulty tracking customer journeys.

Issue 6 | Repetitive Enquiries

The Problem: You're receiving numerous repeat enquiries that take up valuable team time but could be easily automated with the right solution.

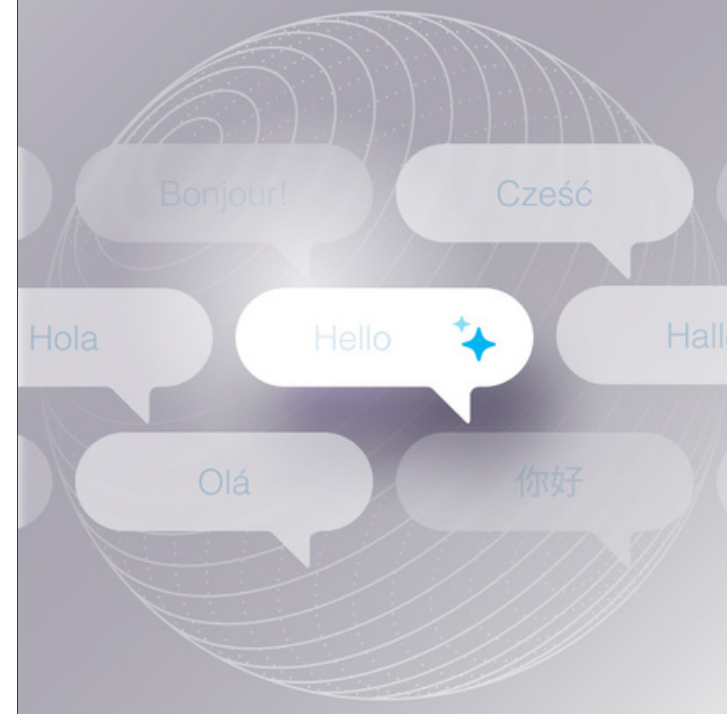
Common Signs: Team frustration with answering the same questions, FAQs on website being ignored, high volume of simple "information only" calls.



Which of these
issues are a
priority for you?

Improving Customer Service Availability

Take a step back and look at your business as a whole. Think about how and when your customers want to engage - and how you compare to the leaders in your industry.



Competitive Advantage

- What are your competitors offering in terms of service availability?
- Are customer expectations in your industry changing faster than your service capabilities?

Timing & Access Needs

- Do you receive enquiries outside business hours?
- Would extending your service hours (or going 24/7) help you win business or retain customers?
- Are your current service channels meeting needs
 - For example, would voice options be more convenient?



Resource & Revenue

- Are you missing revenue opportunities when your office is closed?
- Could automation help you to scale without recruiting more staff?
- What would help your existing team to be more efficient and focus on higher-value interactions?



The Cost of Serving Customers

Consider your current customer service processes, are there any inefficiencies or hidden costs? Understanding your baseline costs and volumes is essential for calculating potential ROI.

Opportunity Costs & Questions

- *Does the volume of enquiries justify an investment to improve the experience?*
- *What could your team accomplish if they weren't handling routine enquiries?*
- *Are skilled staff spending time on tasks that don't require their expertise?*

Your Inbound Enquiries

Volume & Type

Roughly how many enquiries do you receive every week/month - are these new sales, customer support, general information, complaints or technical? What percentage could be resolved with access to the right information, without human judgment?

Current Handling

- How are enquiries currently managed? (Phone, email, web form, social media)
- What's your average response time for each channel?
- What percentage of enquiries are resolved at first contact?

Current Service Costs

Direct Costs

Calculate what your customer service costs to deliver today in terms of staff salaries. How much time do team members spend on routine, repetitive enquiries versus valuable customer interactions? What are your channel costs? (Phone system, live chat software, email management tools).

Hidden Costs

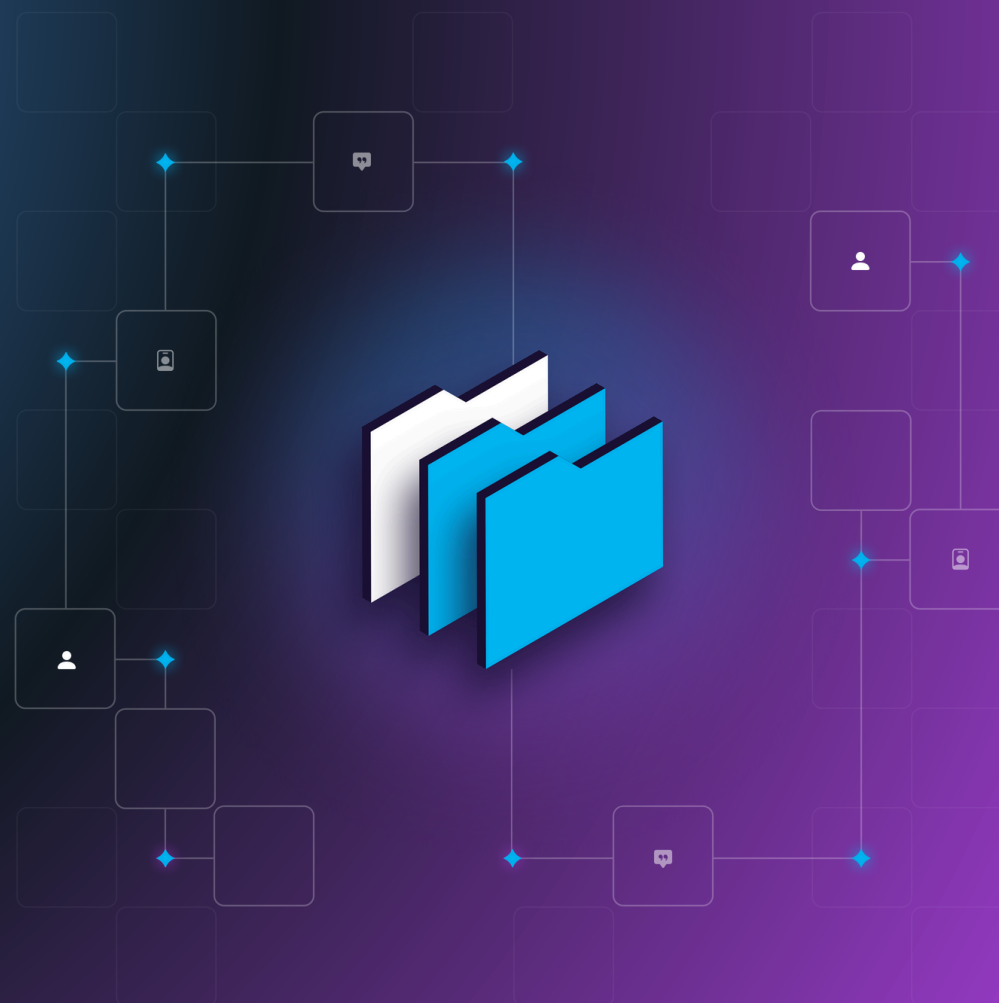
- Training and onboarding time for new staff to be ready to handle common enquiries
- Lost sales due to missed opportunities or slow response times
- Customer churn resulting from poor service experiences
- Overtime or temporary staff during peak periods

Your Knowledge and Data

AI Assistants or AI Agents, can retrieve knowledge, use and update data which is held within your business making it available via chat or voice 24/7.

Understanding the information or knowledge you'd like your AI to access will help us to recommend the best solution for your business needs.

“Is the knowledge that you need to answer customer questions buried across multiple sources, or is it centralised and easy to access?”



Where is knowledge currently held?

Common Knowledge Sources:

- Company website (product information, pricing, policies)
- Knowledge bases or wikis
- Product guides, manuals, and technical documentation (pdf.s)
- FAQs and standard operating procedures
- Training materials, PowerPoint slides etc.

Internal Systems:

- CRM systems (customer history, preferences, previous interactions)
- Order management, booking systems or ServiceDesk
- Inventory databases
- Internal databases or spreadsheets

Data Accuracy & Maintenance

Quality Check:

- Is the data you need for your project accurate, up-to-date, and easy to access?
- Who is responsible for maintaining this information?
- How often does the data need to be refreshed? Is there a regular process for this?

Integration Capabilities & Requirements:

- Do your existing systems have APIs or integration options?
- Are you open to migrating or consolidating information to improve accessibility?

Security & Compliance Needs:

- What data protection requirements apply to your customer information?
- Are there any regulatory considerations (GDPR, industry-specific regulations)?

The converse360 Advantage

What Differentiates Our Approach?

converse360 makes AI and automation accessible to Small and Mid-size organisations with in-person-like voice and chat experiences vs. robotic chatbots.

Our Assist-me no-code platform is easy to use and manage in-house without burdening your technical team. With low-code integrations Assist-me also connects your customer journey seamlessly with existing customer service platforms or contact centres - or even provide Live Chat, hand-off for escalations when it's needed.

With scalable pricing designed around SME use-cases and a UK-based team ready to support you converse360 is dedicated to ensuring that your customer service automation project gets off to a great start, and delivers long-term value for your business.

Your AI & Automation Journey with converse360

Phase 1: Discovery & Planning We help to identify your highest-impact use cases and map out your customer service workflows

Phase 2: Build & Train Configure your AI Assistant, train it on your knowledgebase and integrate with your existing systems.

Phase 3: Test & Refine Test your AI Assistant with real customer enquiries, refine responses based on performance and feedback.

Phase 4: Launch & Scale Go live with your first use-case, monitor results and expand with additional channels as confidence grows.

Typical timeline from initial conversation to live deployment: 1-4 weeks for first use case.



Case Study

Wales Millennium Centre

Wales Millennium Centre receives thousands of incoming voice calls, webchats and email enquiries every month, with enquiries spiking when new shows are released and during major performances.

The team set out to:

- Improve customer service without increasing headcount
- Transform customer experience in line with a digital-first approach
- Unify systems with a seamless integration to their contact centre
- Empower customers with improved self-service for ticket or event enquiries
- Improve responsiveness with a flexible service to manage fluctuations of enquiries and to support ticket sales

Using the Assist-me platform Wales Millennium Centre were able to create and launch a fully branded multi-lingual AI Assistant, which they named 'Bot'.

Bot provides 24/7 customer service and connects seamlessly with the contact centre for instant hand-over to human agents, sharing full chat transcripts to save time.

Bot provides instant answers for a range of ticketing enquiries, including questions about shows and events, group bookings, seat selection, pricing and discounts, how to pay for tickets and much more...

"Our customers love it that they can quickly check details using the AI Assistant and avoid needing to call our team, this relieves the pressure on our team too – they have more time to deal with customers who need more help "

Rhys Davies, **Head of Digital Services,**
Wales Millennium Centre

More customer stories [here](#)

The Results You Can Expect

Below are Industry Benchmarks & **Realistic Expectations** for an AI-powered customer service automation project.

When fully trained, your AI Assistant can **understand and respond to up to 95% of inbound enquiries** within its designated scope.

95%

Enquiries **Successfully Triaged**

AI Agents excel at handling routine, information-based queries instantly and accurately. The remaining 5% requiring human judgment are seamlessly transferred to your team with full context.

40%

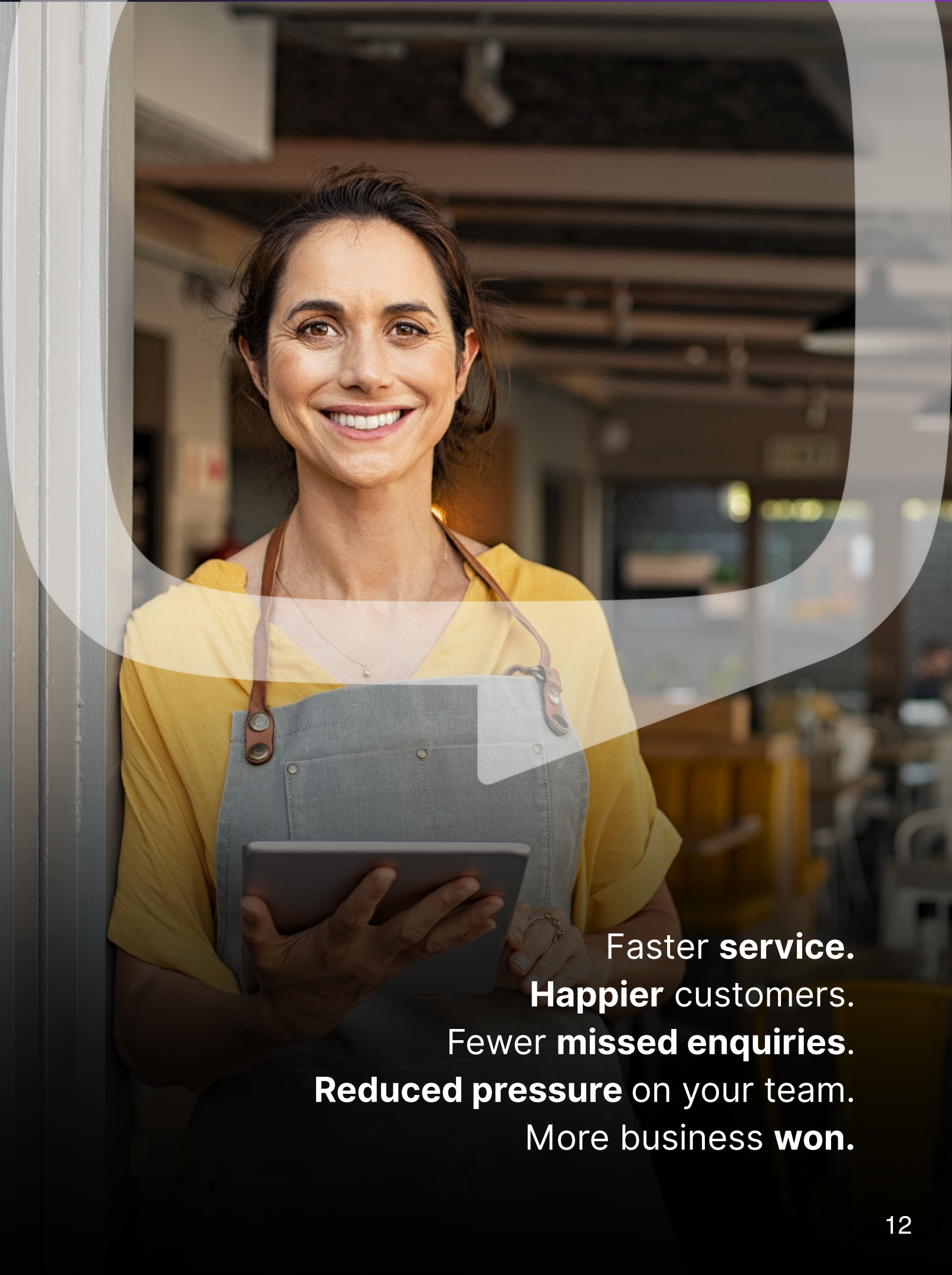
Savings on Operational Costs

According to McKinsey, the average operational cost saving using AI and automation is 40%, driven by reduced staff time on routine tasks and the ability to scale without proportional headcount increases.

30%

Uplift in Customer Satisfaction

Research shows customers value stress-free, effortless, and personalised services made possible with AI.



Faster service.
Happier customers.
Fewer missed enquiries.
Reduced pressure on your team.
More business **won.**

What Happens Next?

Once you've considered some the questions raised in this guide, you should be in a good position to explore where AI-powered customer service automation can benefit your business.

We'll help you to:

- ✓ Identify use-cases or processes most suited for automation within your business.
- ✓ Estimate your projected ROI with a proof of value calculation based on your actual costs and volumes
- ✓ Deliver an AI-powered customer service solution via a platform that you can manage in-house.
- ✓ Start small and scale strategically

To schedule your discovery call with our team [book here](#)



Popular automation use cases

- **Virtual Concierge** answers FAQs about your company, service or product.
- **Booking Assistant** automate calendar or resource bookings for appointments, hotels, restaurants, sports courts or engineer visits.
- **Retail Assistant** pay for event tickets, process restaurant orders and manage deliveries and returns.
- **Sales Assistant** build bespoke customer quotes for your products or services.
- **Help Desk Assistant** provide user self-service and triage support tickets.

For additional inspiration visit our [use case directory](#) and search by business function or industry to see what else AI & Automation could do for you!

Clear Straightforward Pricing

Set-up costs start small and only grow as you increase complexity and increase usage. You pay for value delivered, not unused capacity.

We'll provide a detailed proposal after understanding your specific needs, but our goal is to deliver ROI within the first 3-6 months of deployment.

View our [pricing tables](#).



Richard Brown

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converse360 Team

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About converse360

converse360 enables organisations to automate customer service and also internal processes using conversational and generative AI. This results in more effective customer communication and engagement — listening, responding, and transacting — both improving employee productivity and delivering customer satisfaction.

We focus on helping businesses implement affordable, intelligent AI-powered automation for in-person-like voice and digital experiences, expanding customer service to 24/7.

Based in Wokingham, UK, we provide local support with deep expertise in AI automation for SMEs across a variety of sectors.

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