

# Live Chat at Our Core. *AI on Your Terms.*

Our take on the evolution from live chat to AI.



**Live chat is not being replaced by AI.** It is becoming part of a broader, more capable customer service experience.

ChatBeacon began with live chat in 2005, when real-time digital customer service was still an emerging idea. Since then, we have watched the industry progress from person-to-person chat to guided chatbots, workflow automation, AI-assistance, and now customer-facing AI Agents. Each stage has created new ways to help customers while reducing repetitive work for employees.

Our take is simple: new technology should expand your options while preserving what already works. Customers should always be able to reach a person when they need empathy, judgment, or a little extra help. Your team should have tools that ease repetitive work and give them more time for meaningful conversations. Whether AI supports your staff behind the scenes or assists customers directly, you decide where it fits and when you're ready.

That is why ChatBeacon supports the full evolution of digital customer service. You can start with live chat and SMS, add guided multiple-choice chatbots for predictable automation, use AI privately to assist operators, or deploy customer-facing AI with clear guardrails and a path to a live operator.

**After more than 20 years in live chat, we don't believe every organization needs to take the same path.** The right starting point is the one that improves service without asking your customers or employees to move faster than they're ready for.

# Where is your organization today?

There is no single right place to begin. Which of these sounds most like your organization?

## 01. HUMAN

**“We want our customers to reach a real person.”**

Connect customers directly with your employees through real-time live chat and SMS. Your team can receive, route, manage, transfer, and review conversations without placing a bot between the customer and a person.

## 02. GUIDED

**“We want automation, but not generative AI.”**

Automate routine interactions with structured chatbots that use menus, buttons, and multiple-choice paths. These guided workflows use choices, responses, and outcomes your organization defines rather than generating open-ended answers. They can answer common questions, collect information, route requests, and start approved processes.

## 03. ASSISTED

**“We want AI helping our employees, not talking to customers.”**

Let AI help behind the scenes without making it customer-facing. Cue Instant Recall can suggest replies and surface useful information while other capabilities summarize conversations, preserve context, and reduce repetitive work. Your operator reviews the information, applies judgment, and remains the person communicating with the customer.

## 04. AI-POWERED

**“We’re ready for customer-facing AI.”**

When you are ready, Aria AI Agents can handle the customer-facing use cases you approve. AI-to-human escalation keeps your team within reach whenever a conversation needs empathy, experience, or human judgment.

A routine request might begin with a guided menu, a sensitive issue might go directly to an employee, and an operator might use AI privately for assistance. ChatBeacon gives you the flexibility to design the experience around your customers rather than forcing every conversation through the same technology.

• MODERN AT EVERY STAGE

## Modern capability at every stage

Whichever approach you choose, human service and modern technology should strengthen one another. ChatBeacon gives your team practical tools to work efficiently while keeping service personal:

- |                                             |                                                   |
|---------------------------------------------|---------------------------------------------------|
| ✓ Real-time website chat and SMS            | ✓ Skills-based routing and conversation transfers |
| ✓ Customer context and conversation history | ✓ Prepared responses for speed and consistency    |
| ✓ Operator collaboration                    | ✓ Co-browse and video assistance                  |
| ✓ Reporting and performance visibility      | ✓ Guided chatbot workflows                        |
| ✓ Optional operator-facing AI assistance    | ✓ Optional customer-facing AI Agents              |

**Use what is valuable now and turn on additional capabilities as your strategy develops, without replacing the platform or rebuilding your service operation.**

# Capability matters. So does control.

After more than 20 years in live chat, we know that customer service is not simply an exchange of information. The person reaching out may be frustrated, worried, confused, or making an important decision. Speed helps, but so do patience, context, empathy, and the confidence that someone is listening.

The role AI plays should be clearly defined, with boundaries that reflect your policies and responsibilities. When you choose to use AI, ChatBeacon can help put guardrails around how it operates. Depending on the use case, those safeguards can include:

- |                                                                    |                                                                                |
|--------------------------------------------------------------------|--------------------------------------------------------------------------------|
| • Limiting AI to approved information and defined responsibilities | • Screening for personally identifiable information                            |
| • Controlling which workflows are automated                        | • Establishing when a conversation must move to a live operator                |
| • Keeping people involved where review or judgment is required     | • Selecting a deployment model that fits your data and governance requirements |

Guardrails are especially important in data-sensitive industries, but they matter to every organization. Customers should know that AI is working within intentional boundaries, and your team should understand where automation ends and human responsibility begins.

As the industry becomes more AI-focused, ChatBeacon remains customer-first. We will explain the options, answer the hard questions, and help you choose an approach that fits your customers, policies, and goals. That could mean human-powered service, controlled automation, operator assistance, customer-facing AI, or a combination built around different needs.

• CHOICE BEYOND FEATURES

# That control extends to deployment, and to the people behind the platform

ChatBeacon is available in the Cloud, Dedicated Private Cloud, and On-Premise, so your organization can also choose the deployment model that best fits its security, governance, and data requirements.

## Cloud

Managed convenience with a straightforward path to launch.

## Dedicated Private Cloud

Greater isolation, flexibility, and organizational control.

## On-Premise

Deploy within your own infrastructure for specific data and governance needs.

### Developed and supported in the United States.

ChatBeacon works directly with customers. We provide hands-on implementation, responsive support, and access to people who understand the platform. We will not recommend technology simply because it is new or receiving attention. We will help you determine what will genuinely improve service for your organization and the people you serve.

**That is what human-centered technology looks like to us.**

# Frequently asked questions

If you are deciding where to begin, these are some of the questions organizations ask us most often.

## **Can ChatBeacon be used without customer-facing AI?**

Yes. ChatBeacon can operate as a complete human-powered live chat and SMS platform. Customers can connect directly with your employees without first interacting with an AI Agent.

## **Can we automate customer interactions without generative AI?**

Yes. ChatBeacon supports guided, rules-based chatbot workflows using menus, buttons, and multiple-choice paths. Your organization defines the choices, responses, and outcomes in advance.

## **Can AI assist our operators without talking to customers?**

Yes. ChatBeacon can use AI behind the scenes to suggest replies, surface approved information, summarize conversations, retain context, and assist with internal work. Your operator remains responsible for the customer interaction.

## **Can we add customer-facing AI later?**

Yes. You can begin with live chat, SMS, guided automation, or operator assistance and add Aria AI Agents when you are ready without replacing ChatBeacon.

## **Can we use different approaches for different conversations?**

Yes. Your organization can decide which interactions go directly to employees, which use guided automation, and which are appropriate for AI. AI-to-human escalation can move a customer from an AI Agent to a live operator when personal attention is needed.

## **Does ChatBeacon charge per AI resolution?**

No. If you decide to use AI, ChatBeacon does not charge per AI-generated resolution.

• YOUR PACE. YOUR PATH

# Built for today. *Ready for what's next.*

Start with live chat, add multiple-choice chatbots, or give operators AI assistance behind the scenes. When you're ready, extend AI to customer conversations with clear guardrails and access to a live operator. Choose what works for your team today, with room to evolve.

## Let's talk about what your team needs.

Contact us to explore your options, schedule a demo or start a free trial at <https://signup.chatbeacon.io>



## • GET IN TOUCH

SMARTMAX SOFTWARE

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