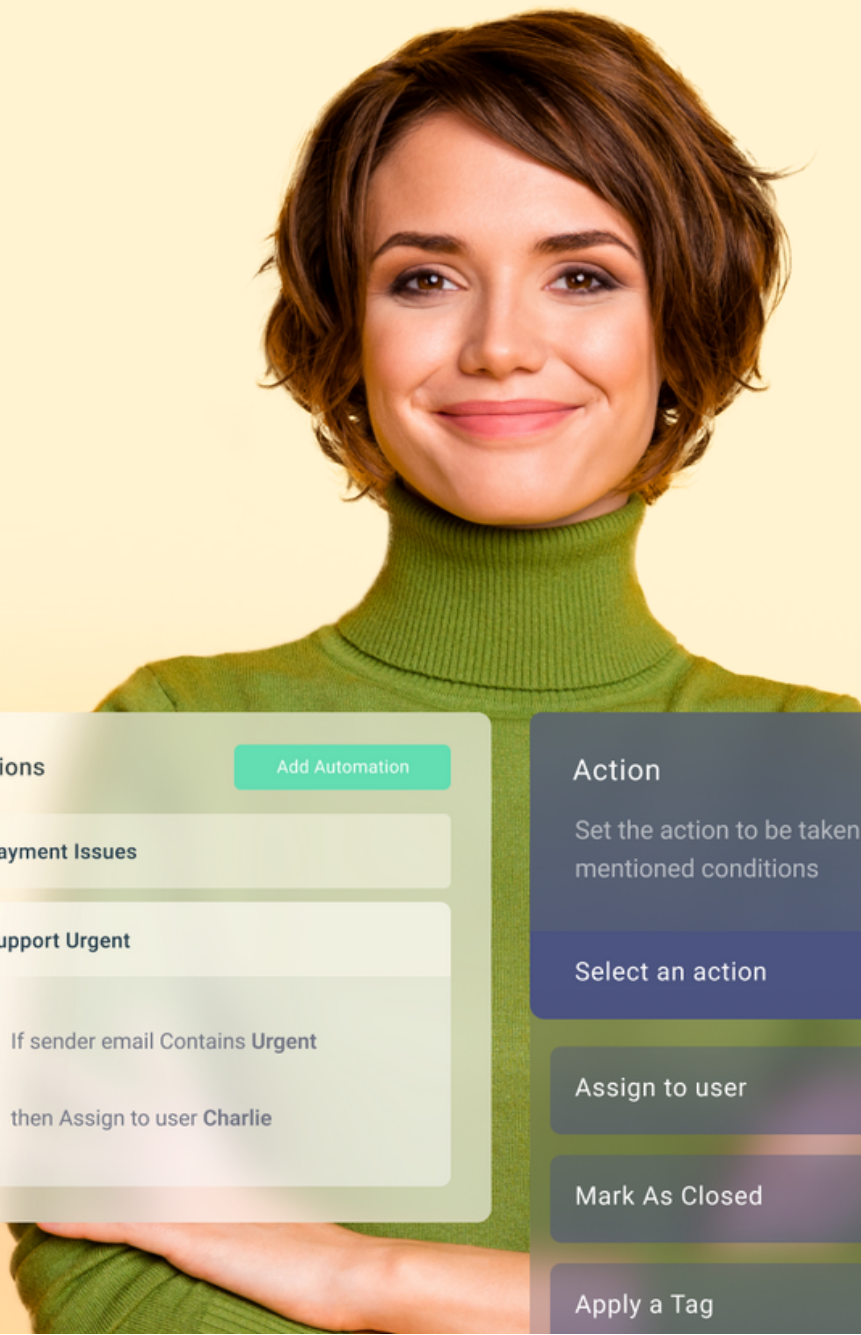




Using Automation in Customer Service

(Without Compromising on the Human Touch)



Automations

Add Automation

Payment Issues

Support Urgent

If sender email Contains Urgent
then Assign to user Charlie

Action

Set the action to be taken for the mentioned conditions

Select an action

Assign to user

Mark As Closed

Apply a Tag

Introduction

Automation has helped several companies around the globe enhance the efficiency of their processes and increase profitability. According to a [2021 study by SnapLogic](#), investments in automation contribute to an increase in business revenues by 5-7%, job growth by 4-7%, and long-term productivity by 15%.

And in the context of customer service particularly, apart from improving agent productivity and cutting down costs, automation goes a long way in increasing customer satisfaction.

By helping companies significantly lower response times.

But, companies cannot merely implement automation in their customer service processes and expect miracles to happen.

In today's hyper-competitive era, customers expect brands to go the extra mile to create wholesome, consistent, and personalized experiences.

According to an [MIT Technology Review report](#), "iconic" firms – those that maintain the highest levels of customer experience satisfaction – believe that automated AI tools are most effective when they supplement and extend the capabilities of their customer support team – not replace them.

That's why blending **automation with the human touch** is necessary.

In this guide, we'll help you further understand the importance of automating your customer service processes and how to do so **without compromising on the human touch**.

What is automation in customer service?

In a customer service scenario, automation technology can help you understand your customers' issues and resolve them in the best way possible with minimal agent effort and involvement.

As such, automations significantly lower the time and effort it takes for support agents to assist customers, thereby reducing customer wait and response times.

How companies can benefit from automating their customer service

1. Reduces the burden on your support agents

Customer service teams have to deal with a huge volume of queries daily. Having to manually sort and prioritize these queries can be extremely overwhelming and time consuming.

This is where automation can help. You can set automations in a way that queries with certain keywords in the subject line, for example, "urgent" or "finance", are routed to specific members within your team.

Create new automation

Automation name

Auto-assign to John when subject has 'downtime'

When

New conversation recieved

If

Subject contains downtime

Match case

Then

Assign to John

+ ADD action

Save and enable

This way, your team doesn't have to go through the painstakingly long process of manually organizing customer requests, tagging them, and routing them to designated team members.

2. Improves customer satisfaction levels

According to [Hiver's latest research](#), 52% of customers say that waiting long hours for a response is the most annoying thing about getting support via email.

The same research also shows that **34% of customers expect their support queries to be resolved within two hours.**

Clearly, there's a disparity between customers' expectations and companies' ability to fulfill those expectations – and that's a gap automation can help you bridge.

Automation allows you to automatically assign incoming emails to customer service representatives **based on the nature of emails and the expertise of the agents.**

With this, agents have instant clarity on which queries to handle. As a result, your team's efficiency improves, turnaround time of emails gets reduced, and no customer query goes unanswered.

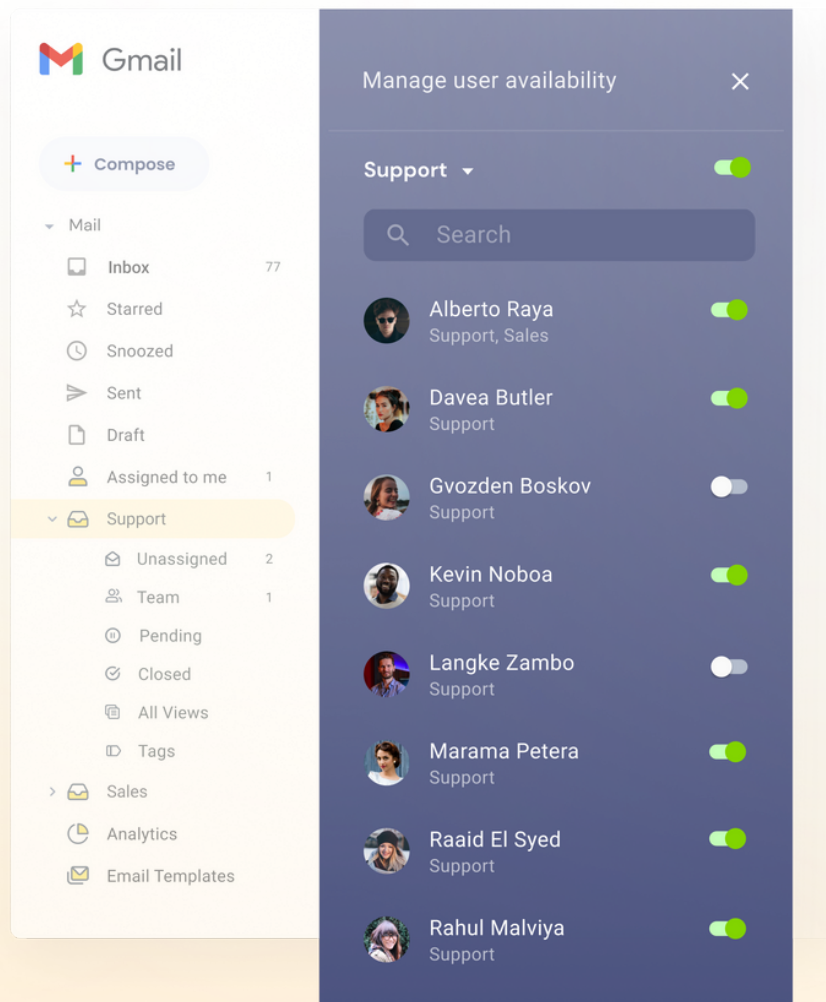
When your customers consistently get swift and constructive support responses from agents who are subject-matter experts, it's bound to reflect positively on your team's CSAT scores.

3. Helps you deliver world-class customer service with fewer resources

Customers today expect businesses to serve them round-the-clock.

Now, if you're a large business, you can meet this expectation by hiring more customer service representatives. But when you're a small company and your resources are limited, customer service automation lets you deliver top notch customer support without going overboard with your hiring budget.

With customer service automation, you can **use auto-responders and round-robin assignments** to ensure that every customer email gets a satisfactory response – even beyond your business hours.



You can do this by investing in a cloud-based customer service software. Such a tool can be purchased on a per-user or a subscription basis, and you can scale it up or down based on your budget and business needs.

4. Helps you personalize customer communication

When we talk of automated support, we often associate it with cold and impersonal customer service. Surely that's not the kind of experience you want your customers to have.

But when used effectively, automations can help you deliver highly innovative and personalized customer service experiences.

With customer support automation, you can achieve personalization at scale by creating email templates with the right auto-fill variables.

The image shows a user interface for editing an email template. At the top, there's a header with a back arrow, the text "Edit email template", and two buttons: "Cancel" and "Save template". Below the header, there are two input fields: "Template name *" and "Folder *". Underneath these is a "Subject" field. The main section is labeled "Content *" and contains a rich text editor. The editor has a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, text color, background color), links, images, and lists. A "Placeholder Properties" dialog box is open in the foreground, partially obscuring the editor. This dialog has a title bar with a close button (X), a label "Placeholder Name", a text input field, and "Cancel" and "OK" buttons at the bottom.

Auto-fill variables are temporary values such as a customer's first and last name, email address, etc., placed in the body of your email. These can help you customize the email experience for every single customer on your list.

Hi there, Thank you for starting your 14-day free trial. We'd love to give you a 15-minute demo to show you how we can help. You can schedule your session here. Speak soon, Hooli onboarding team	Hi Richard, Welcome to Hooli! I'm Gavin Belson and I'm excited to guide you through your free 14-day trial. I'd love to set up a quick 15-minute demo call to walk you through Hooli and show you and your team at Pied Piper how Hooli can help you get a competitive advantage. You can schedule your session here. Speak soon, Gavin Belson CEO, Hooli
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Let's consider the examples shown above. Though both examples convey the same message, the message on the right is personalized using auto-fill variables, making it sound less automated and more human.

5. Makes your customer service team more productive

No matter how skilled and efficient your customer service team may be, they're bound to come across tasks that can really slow down their productivity.

Let's consider a common scenario. Every day, your support reps probably receive several easily-resolvable customer emails of similar nature. If they have to manually type out replies to each of these emails over and over, they'll not be able to give the more complex and important customer service tasks the time and effort they require.

That's where **canned responses** can come to your rescue.

You can **set up canned responses for common support scenarios** (for example, when a customer forgets their password) and personalize them with unique customer details before sending them across.

Automating such emails helps improve your team's productivity and prevents them from making errors.

Below is an example of a template for when a customer's payment doesn't go through:

< Edit email template

Cancel

Save template

Template name *

Payment Failure

Folder *

Payments

Subject

Action Needed: We were unable to charge your credit card

Content *

Norm... Font [P] [Image] [Smiley] B I U S A A Source [List] [List] [List] [List]

Hi there,

We were unable to charge your credit card on file. Please update your credit card details from the admin panel.

Regards,

How Hiver can help you automate your customer service while keeping the human touch alive

We've made a strong case for the importance of implementing automation in your customer service department.

But, before you set that up, you need to make sure you invest in the right kind of customer service software that offers you robust automation capabilities.

Apart from being rich on the automation feature set, **ensure your helpdesk is easy to set up and use**. Most importantly, opt for a helpdesk that helps you blend automations with the human touch – just like Hiver does.

Hiver – the world's first helpdesk designed for Google Workspace users – is especially built to drive meaningful conversations between humans. It doesn't reduce customers to "ticket numbers".

If you're using Hiver for customer service, here's all (and more) that you can do with its automation capabilities:

1. Customize your team's workflows with rule-based automations

Rule-based automations are "if-then-else" statements that get triggered when a certain set of conditions are met.

You can set up a rule-based automation to **assign all queries with the word 'payments' in the subject line to someone from your finance team.**

You can also set up an automation to **add an 'urgent' tag to queries from certain customers.**

And to prevent your team's inbox from getting cluttered, you can set up a conditional assignment to automatically **change the status of all incoming promotional emails to 'closed'.**

For example, here's how you can create an automation to add a tag and assign all refund-related emails to a team member using Hiver.

▶ When

New conversation recieved

⚙️ If

Subject

contains

refund ×

☐ Match case

Body

contains

refund ×

refunds ×

☐ Match case

+ OR condition

✔️ Then

Assign to

Ryan Bator

+ ADD action

2. Ensure equitable workload distribution using round-robin assignment

Imagine a situation where a customer emails your business and you ignore it thinking that your teammate will handle it. Your teammate ignores it thinking you, or someone else from your team will take care of it. Eventually, nobody does and the customer gets so furious that they cancel their subscription with you. Not a situation you would like to see yourself in.

That's why Hiver created round-robin assignments. This feature ensures that **all incoming emails get automatically assigned to your team members in an equitable manner.**

This way, every email has a dedicated owner and no customer request gets buried under a sea of emails.

Here's a visual representation of a round-robin queue in Hiver.



Hiver also lets team members update their availability using simple toggle controls – so if they're unavailable, queries don't get assigned to them.

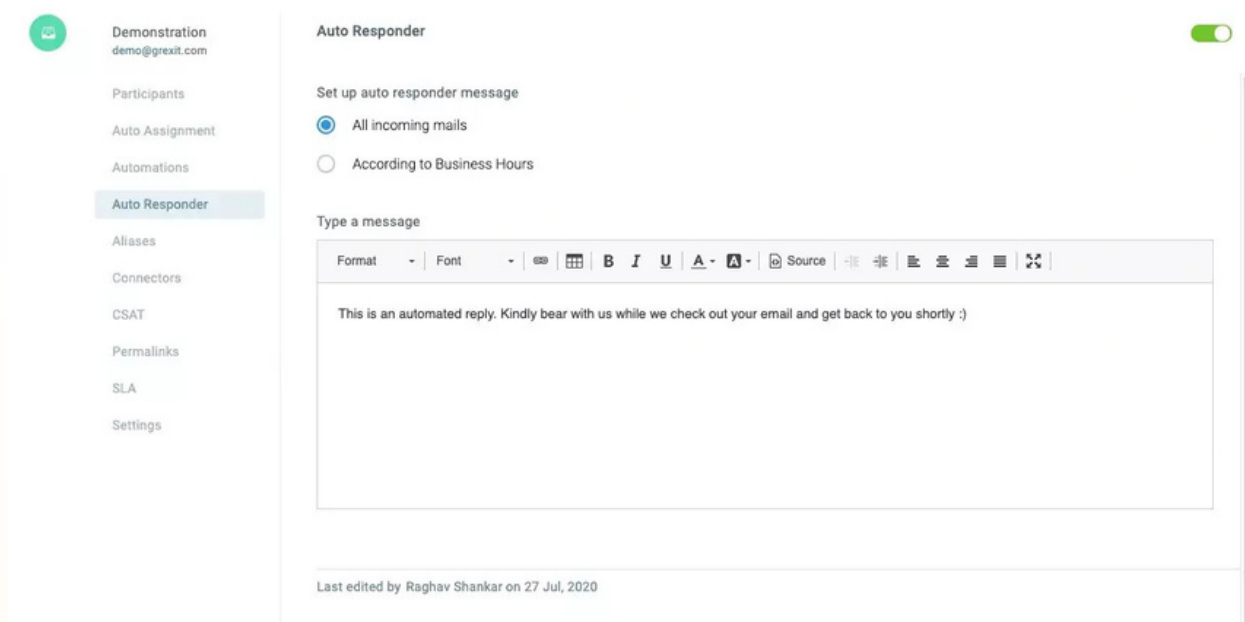
3. Always keep customers in the loop using auto-responders

Have you ever emailed a company asking them for help regarding a product or service only to be left waiting for a response that never came?

A study conducted by SuperOffice found that 62% of companies don't reply to customer service emails. Shocking isn't it?

With auto-responders, you can rest assured that your customers won't have a similar experience.

Auto-responders are automatic emails that will be sent in response to an incoming query. **With these emails, you can set the right customer expectations** by specifying your business hours, the time you'll take to get back to them, and even give them alternate sources of information/ways to reach you. Additionally, you can add links to your knowledge base articles to help customers self-serve.



Above is an example of how you can customize an auto-responder email in Hiver.

A common issue with most auto-responder emails is that they sound too impersonal and robotic. They're often weirdly formatted and come from email ids like noreply@abccompany.com.

With Hiver, **you don't have to worry about your emails sounding cold and robotic**. Customers can respond to auto-responder emails just like any other regular email.

4. Work faster with intelligent inputs from Harvey – Hiver's AI sidekick

Ever wished you had a personal assistant who could do the heavy lifting for you while you focus on getting actual work done? That's exactly what Harvey, Hiver's AI bot can be for you.

Oftentimes when you resolve and close a customer issue, they respond with a “thank you”. Even though there’s no action needed on such an email, their “thank you” reopens the conversation and you have to manually close it again.

Harvey’s ‘Thank You Detection’ feature **identifies and closes these non-actionable customer conversations**, which not only saves you time but also prevents your metrics from getting skewed.

Additionally, Harvey also analyzes your customer messages and suggests the most relevant template(s) you can use to offer customers a satisfactory resolution. You can even combine parts of Harvey's suggested templates to customize your responses.

The image displays a screenshot of an email conversation on the left and a support interface on the right, illustrating Harvey's 'Thank You Detection' feature.

Email Conversation:

- From:** Megan Parker (bart@acme.com) to Bart Miller (success@globex.com), 04:15 PM
- Body:** Hello Bart, Your request for seat limit increase has now been processed. You should now be able to add 30 members to your team via the admin panel. Let me know if you face any difficulties. Have a great rest of the week ahead :)
- Signature:** Best, Megan
- From:** Bart Miller (success@globex.com) to Megan Parker (bart@acme.com), 04:20 PM
- Body:** Thanks for the quick turnaround, Megan.
- Buttons:** Reply, Forward

Support Interface:

- Support** (icon: envelope, close: X)
- Assigned to:** Megan (icon: person)
- Status:** Closed (dropdown arrow)
- TAG:** Harvey-Thank-you (tag icon)
- Activity (1):** (dropdown arrow)
- + Add a note...** (button)
- Harvey detected a Thank You message and changed the status to closed** (notification bubble, 04:20 PM, icon: robot)
- Hiver changed the status to Open** (notification bubble, 04:20 PM, icon: Hiver logo)

5. Respond to repetitive customer queries quicker with email templates

As a support professional, you often need to respond to a slew of similar customer requests on a daily basis. Canned responses or templates can lift a huge burden off your back as you don't have to individually type out responses to those emails again and again.

With Hiver, you can simply **create email templates for a range of common support issues** like forgotten passwords or access control. You can further organize these templates into folders and share them with your team. With a single click, you can insert these templates as email replies.

Here's an example of what templates look like in Hiver:

The screenshot displays the Hiver 'Edit email template' interface. On the left sidebar, under 'Email Templates', there is a 'Create email template' button and a search bar. Below this, a 'Recently used' section lists several templates. The 'Folders' section shows a list of folders, with 'AR-email 1' selected. The main content area is titled '< Edit email template' and includes 'Cancel' and 'Save template' buttons. The form fields are as follows:

- Template name ***: Payment Failure
- Folder ***: Payments
- Subject**: Action Needed: We were unable to charge your credit card
- Content ***:
Hi there,

We were unable to charge your credit card on file. Please update your credit card details from the admin panel.

Regards,

Wrapping up

Whether you're looking to save money on staff, streamline your customer support processes, or simply make your customers happier, there are many benefits to be gained from embracing automation – far more than the initial costs and technical challenges.

That being said, at the end of day, customers value the personal touch, and that's what keeps them coming back; that's what helps your company stand out in today's crowded marketplace.

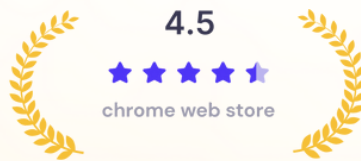
The key lies in striking the right balance between human relationships and automation – and investing in a helpdesk like Hiver can make your job of achieving that balance a lot easier.



**Join the 8000+ teams that use
Hiver to deliver brilliant
customer service**

SIGN UP FOR FREE TRIAL

REQUEST A DEMO



Or, get in touch with us at



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