Tool Tips: AI Agent Assist Best Practices

WHAT IS AI AGENT ASSIST?

AI Agent Assist is real-time artificial intelligence (AI), designed to help you handle customer interactions more effectively. It provides you:

- An AI assistant you can chat with to get answers to business-specific information
- A live, searchable call transcript
- Real-time sentiment analysis
- An automatic, editable recap of the call with a summary and next actions.

AI Agent Assist is designed to help you focus on helping customers rather than searching for information.

HOW IT HELPS YOU

Quick Answers
Get instant, accurate responses from company knowledge sources without pausing the conversation.

Live Transcription
Easily reference past details while on a call.

Customer Sentiment Tracking
See if a customer's mood is improving or declining and adjust accordingly

Automatic Notes
Spend less time on post-call notes and more time assisting customers

MAKE EVERY AGENT YOUR BEST AGENT:

BEFORE THE INTERACTION

AI Call Summary – Provide agents with a concise summary of a returning customer's last interaction, to help them personalize the conversation and resolve the interaction faster.
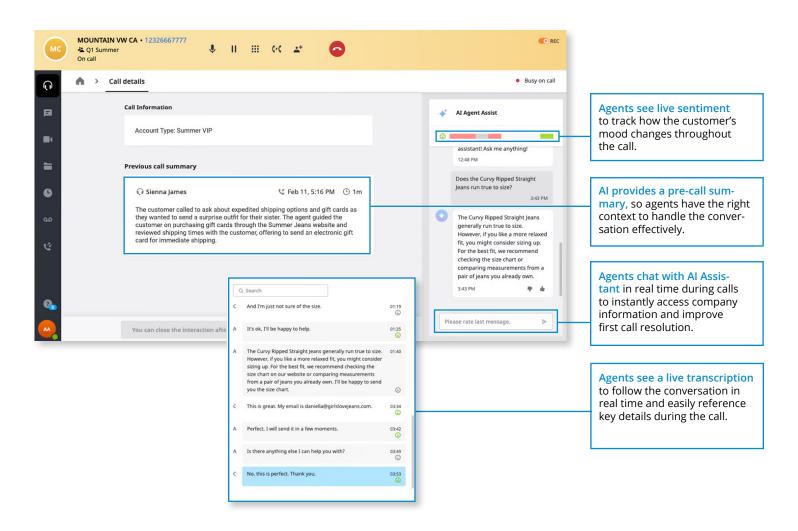
DURING THE INTERACTION

Real-time Access to Business Information – Agents can ask AI Assistant questions via chat during customer calls to quickly retrieve business-specific information (e.g., company policies, product information, or procedural guidelines) to consistently provide accurate answers and improve first call resolution.

Live Sentiment Analysis – Keep conversations positive with real-time time sentiment that tells agents if the call is going in a positive or negative direction.

Real-Time Transcription – Provide agents with a live call transcript to quickly reference past details, reduce errors, and respond more accurately to customer inquiries.

AFTER THE INTERACTION

AI Recap (Coming Soon) - Agents immediately receive an editable summary of the call with action items to expedite documentation and help them quickly get back to helping more customers.

Agents see live sentiment to track how the customer's mood changes throughout the call.

AI provides a pre-call summary, so agents have the right context to handle the conversation effectively.

Agents chat with AI Assistant in real time during calls to instantly access company information and improve first call resolution.

Agents see a live transcription to follow the conversation in real time and easily reference key details during the call.

AI AGENT ASSIST BEST PRACTICES

DO:

1

USE AI ASSISTANT FOR QUICK, FACTUAL ANSWERS

Example: A customer asks about your return policy. Instead of searching through documents, ask AI Assistant via chat, to get the correct policy instantly.

2

CHECK THE LIVE TRANSCRIPTION

Example: If a customer shares their account ID earlier in the call, quickly search the live transcript instead of asking them to repeat it.

3

MONITOR SENTIMENT ANALYSIS

Example: If sentiment analysis shows the customer is becoming frustrated, slow down, acknowledge their concern, and adjust your tone to de-escalate the situation.

4

REVIEW AI SUMMARIES

Example: Before logging your notes, scan the AI-generated summary to ensure key details are captured accurately and make any necessary corrections.

AI

AI Agent Assist

DON'T:

1

RELY ON AI ALONE
Example: AI provides an answer about a refund process, but the customer's situation is unique. Always apply your judgment to confirm the response fits their needs.

2

USE IT FOR GENERAL INFORMATION
Example: A customer asks for the latest industry trends or a competitor's pricing. AI Agent Assist only provides information from your company's internal knowledge sources, not the open internet.

3

SHARE PERSONAL OR SENSITIVE CUSTOMER DETAILS
Example: AI can retrieve business policies but does not access specific customer accounts. Never attempt to use it for retrieving customer payment or personal details.

4

IGNORE SENTIMENT CUES
Example: If AI shows the customer is increasingly negative, don't keep reading AI-suggested responses robotically—engage personally to de-escalate the issue.

5

SKIP VERIFYING INFORMATION
Example: AI suggests a response about a product feature, but you know the product has recently changed. Always double-check AI-provided answers before sharing with the customer. Alert your supervisor if you see an incorrect/outdated answer.

> Tip: AI Agent Assist is here to support you—not replace human interaction. Use it as a tool to enhance conversations, not as a script.

QUESTIONS? CONTACT US TODAY!

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