AI-first support playbook

AI in support works best when it's focused, practical, and tied to real outcomes. This playbook helps you cut through the hype, run a smart AI pilot, and improve support performance without overcomplicating your operation.

It's designed for support leaders who want to start small, prioritize the use cases that actually matter, and prove measurable impact before scaling. Rather than prescribing tools or architectures, it focuses on decisions, guardrails, and operating habits that help teams adopt AI in a way that sticks.

How to use this playbook

- Use the examples as guidance
- Replace example text with your own answers.
- If you can't answer a section, pause and fix the foundation before moving on.

1. Define the outcome

Clarify the single support metric or experience AI is meant to improve so success is unambiguous.

What is the single most important thing AI should improve in support?
E.g. Time to resolution

Success definition

How will you know this worked?
E.g. “AI-assisted agents resolve complex tickets 20% faster without reducing CSAT.”

Key metrics

Metric	Today	Target	Notes
E.g. CSAT	92%	94%	Maintain or improve

2. Set boundaries (what AI will and won't do)

Decide upfront where AI is allowed to help and where human judgment must remain in control.

In scope:
E.g. Agent assist inside the ticketing tool to help engineers quickly find the right internal documentation.

Out of scope (for now):
E.g. No AI-generated responses sent directly to customers without human review.

3. Check the basics

Make sure your knowledge, security, and measurement foundations are solid enough to support an AI pilot.

Knowledge
E.g. Primary knowledge lives in Confluence and resolved Salesforce cases. Support Ops owns curation.

Security & access
E.g. AI can access internal KBs and closed tickets, but not customer PII or billing data.

Measurement
E.g. We will compare a 20-agent pilot group against the rest of the Tier 2 team.

4. Choose your pilot use cases (pick 1–2)

Select a small number of high-confidence use cases where AI can deliver visible value quickly.

Use case	Why this matters
E.g. Agent assist	E.g. Engineers waste time searching across tools
E.g. Ticket summaries	E.g. Escalations lose context

5. Prepare knowledge

Identify and include only the most useful, reliable support knowledge to start — you can expand later.

Include first:
E.g. Top 50 most-viewed KB articles and the last 6 months of resolved Tier 2 tickets.

Add later:
E.g. Slack threads added only after security review and content cleanup.

6. Drive adoption (avoid shelfware)

Create clear expectations and habits so AI becomes part of daily work, not an optional experiment.

E.g. During the pilot, agents are required to query AI before escalating a ticket.

Adoption signals to watch:

Signal	Healthy looks like
Weekly usage	E.g. 80%+ of pilot agents active
Queries per agent	E.g. 5-10 per day
Agent feedback	E.g. “Saves time” sentiment

7. Add 1–2 simple automations

Introduce low-risk automations that save time without removing human oversight.

Automation	Trigger	Success metric
E.g. Ticket summary	Escalation flag	Escalation handling time

8. Prove impact (pilot review)

Compare before-and-after results to confirm whether AI is improving the outcomes you targeted.

Metric	Before	After	Change
E.g. Median TTR	4.8 days	3.9 days	↓ 19%
E.g. CSAT	92%	93.5%	+1.5 pts

What clearly improved?
E.g. Faster time to resolution on complex tickets, especially where agents previously had to search across multiple tools.

What didn't?
E.g. AI adoption varied by agent, with some relying on it heavily and others under-utilizing it.

9. Decide: Scale, adjust, or stop

Use pilot results to make a clear decision on whether to expand, refine, or pause the initiative.

E.g, Scale agent assist to all Tier 2 engineers before expanding to self-service.

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10. Keep it working

Establish a lightweight cadence to review performance, fix gaps, and continuously improve results.

Monthly check-in
E.g. Monthly review identifies top 10 unanswered questions and assigns owners to fix them.