

YOUR CX | AI THAT FIXES CX. NOT JUST TALKS ABOUT IT.

DITCH THE BUZZWORDS. THIS TOOLKIT SHOWS YOU WHAT WORKS, WHERE, AND WHY.

WHAT'S INSIDE THE TOOLKIT?

AI Strategy for CX Planner Template

Define your vision, goals, and roadmap for AI-powered customer experience.

AI-Enhanced Customer Journey Map Template

Identify where to embed AI to streamline service, support, and engagement.

AI Use Case Discovery Worksheet Template

Uncover specific AI opportunities in support, marketing, sales, and operations.

CX Automation Tool Selector Template

Compare tools for chatbots, email automation, predictive insights, and more.

AI Voice & Chat Interaction Script Builder

Design conversational flows that feel natural, helpful, and on-brand.

AI Ethics & Data Handling Checklist

Ensure ethical and privacy-compliant use of customer data in AI applications.

WHO IS THIS FOR?

- CX leaders exploring AI for service and personalisation
- Founders and operations managers seeking cost-effective automation
- Digital transformation teams designing smarter journeys
- Agencies and consultants integrating AI into client CX solutions

WHAT YOU'LL BE ABLE TO DO

- Pinpoint AI opportunities in your customer journey
- Choose the right tools for automation and insight
- Design helpful, human-like chat and voice experiences
- Align AI use with ethical and data privacy standards
- Build an AI-driven roadmap without losing your customer-first focus

AI STRATEGY FOR CX PLANNER TEMPLATE

1. VISION & STRATEGIC INTENT

Define your overall vision for AI in CX (e.g. 'Use AI to deliver faster, smarter, and more personalised customer service')

Align AI goals with broader business outcomes (e.g. reduce churn, increase self-service adoption, boost satisfaction)

2. CUSTOMER JOURNEY IMPACT POINTS

Identify where AI can improve the customer journey (e.g. onboarding, support, retention, FAQs, churn prediction)

Prioritise 2-3 high-friction or high-volume stages to focus your initial efforts

3. USE CASE IDENTIFICATION

List current pain points or inefficiencies where AI may help (e.g. long wait times, inconsistent service responses)

Describe the potential use case and outcome (e.g. chatbot for 24/7 service, NPS sentiment analysis, email classification)

4. TOOLS & TECHNOLOGY CONSIDERATION

Audit existing tech stack for AI-ready platforms (e.g. CRM, helpdesk, analytics tools with AI modules)

Research and shortlist 3 tools per use case based on budget, ease of integration, and scalability

5. SUCCESS METRICS & MEASUREMENT

Define how success will be measured (e.g. reduction in resolution time, improvement in CSAT, chatbot containment rate)

Assign ownership for tracking and reporting each KPI

6. GOVERNANCE & RISK

Identify internal stakeholders for AI project governance (e.g. IT, Legal, CX, Data Privacy Officer)

Define key risk areas and mitigation plans (e.g. bias, data privacy, over-automation)

7. 90-DAY AI ACTION PLAN

Phase 1 (Days 1-30):
Research, planning, and pilot design

Phase 2 (Days 31-60):
Tool setup, training, and internal testing

Phase 3 (Days 61-90):
Rollout pilot, monitor, and iterate

AI-ENHANCED CUSTOMER JOURNEY MAP TEMPLATE

1. AWARENESS



Use AI for predictive audience targeting in ads and social



Personalise website content using behavioural analytics

AI Opportunity Notes:

2. CONSIDERATION



Deploy AI chatbots to answer pre-sale questions instantly



Recommend relevant case studies or FAQs dynamically

AI Opportunity Notes:

3. PURCHASE



Use AI-assisted forms or smart checkout flows to reduce drop-off



Trigger automated confirmations and support routing

AI Opportunity Notes:

4. ONBOARDING



Offer AI-driven onboarding journeys based on customer segments



Schedule onboarding sessions using intelligent booking assistants

AI Opportunity Notes:

5. SUPPORT



Implement conversational AI for 24/7 tier-1 support



Use sentiment analysis to prioritise escalations

AI Opportunity Notes:

6. LOYALTY & ADVOCACY



Trigger loyalty rewards using predictive lifetime value models



Request reviews or referrals with personalised timing via AI

AI Opportunity Notes:

AI USE CASE DISCOVERY WORKSHEET TEMPLATE

1. DEPARTMENT / JOURNEY STAGE

What part of the customer experience are you focusing on?

What are the main goals in this area?

2. PAIN POINTS / OPPORTUNITIES

What problems are customers or employees experiencing?

Are there bottlenecks, delays, repetitive tasks, or missed insights?

3. AI OPPORTUNITY DEFINITION

Describe the potential AI use case

How will it help improve customer experience or internal efficiency?

4. FEASIBILITY & READINESS

Do you have the data required to power the AI model?

Is there a system already in place where this could be integrated?

5. EXPECTED OUTCOMES

What measurable results would indicate success?

Are there any risks or unintended impacts to consider?

6. PRIORITY & NEXT STEPS

Rank this use case (High / Medium / Low) based on potential impact and ease of implementation

Who needs to be involved to move this forward? What are the next 3 actions?

CX AUTOMATION TOOL SELECTOR TEMPLATE

TOOL NAME	CATEGORY	PRIMARY USE CASE	AI CAPABILITY	EASE OF INTEGRATION	STRENGTHS	LIMITATIONS
ZENDESK AI	Chatbot/Support	Auto-responses, ticket classification, sentiment analysis	Moderate	Easy	Strong ticket handling automation, native to Zendesk	Limited outside Zendesk ecosystem
INTERCOM	Chatbot/CRM	Conversational support, user onboarding, live chat	High	Moderate	Highly customisable chatbot with CRM integration	Can get costly as usage scales
HUBSPOT SERVICE HUB	Automation/CRM	Workflow automation, ticket routing, knowledge base	Moderate	Easy	All-in-one CRM suite with built-in automation	Less flexible for non-HubSpot users
TIDIO	AI Chatbot	24/7 chatbot for small teams, lead qualification	Basic	Easy	Affordable and quick to deploy for small teams	Limited AI beyond basic FAQs
FORETHOUGHT	AI Agent Assist	Suggesting agent responses, summarising tickets	Advanced	Moderate	Enterprise-grade NLP, real-time coaching	Best suited for large teams and volume
DRIFT	AI Sales Chat	Conversational sales assistant, lead routing	High	Easy	Great for sales enablement with AI routing	Sales focused, less service automation
ADA	AI Support Bot	Multi-language AI bot, instant resolutions	High	Moderate	No-code setup, strong CX automation focus	Less analytics depth than others
FRESHDESK AI	AI Helpdesk	Agent assist, email deflection, knowledge surfacing	Moderate	Easy	Good for mid-size support teams, fast setup	May require tuning for niche cases

AI VOICE & CHAT INTERACTION SCRIPT BUILDER

1. DEFINE YOUR BRAND VOICE



Tone: (e.g., friendly, professional, witty, empathetic)



Personality traits: (e.g., helpful, fun, straightforward)

2. CORE USE CASES

List the top 5–10 tasks customers need help with. For each, define:

- Trigger phrase (e.g., 'Where is my order?')
- Bot response pattern (e.g., 'Let me check that for you...')
- Follow-up prompt (e.g., 'Would you like to track another order?')

3. SCRIPT FRAMEWORK

For each use case, outline:

- Intent name
- Bot greeting
- Input required
- Expected resolution
- Escalation condition
- Human handoff message

4. ERROR HANDLING & CLARIFICATIONS



What should the bot say if it doesn't understand the request?



Assign ownership for tracking and reporting each KPI

5. ESCALATION & ROUTING

Escalate to live agent after X failed attempts or high emotion detected

Example: 'I'll transfer you to our team now—they'll be able to help further.'

6. CLOSING SCRIPTS & FEEDBACK



Confirm action and thank the user



Invite feedback: 'Was this helpful?' [Yes] [No]

7. SCRIPT TESTING CHECKLIST



Test scripts for tone, clarity, and comprehension



Include varied accents (for voice), slang, and edge cases

AI ETHICS & DATA HANDLING CHECKLIST

1. ETHICAL AI DESIGN PRINCIPLES



Ensure fairness: AI should treat all customers equitably, without bias based on race, gender, or background.



Maintain transparency: Clearly explain when a customer is interacting with AI and why.

2. CONSENT & DATA COLLECTION



Obtain clear consent before collecting personal data (e.g., voice, email, location).



Provide opt-out options for AI-based data collection or tracking.

3. DATA USE & MINIMISATION



Collect only the data necessary to deliver the service.



Use data only for stated purposes, with no secondary or undisclosed use.

4. DATA STORAGE & SECURITY



Ensure data is stored securely using encryption and access controls.



Regularly review storage practices to ensure compliance with regulations (e.g., GDPR, CCPA).

5. BIAS TESTING & REVIEW



Test models for biased outcomes across demographic groups.



Schedule regular audits of AI decision-making logic.

6. ESCALATION TO HUMAN OVERSIGHT



Provide easy options for customers to escalate conversations from AI to a human.



Document all handoffs and ensure human staff are trained to handle sensitive issues.

7. ONGOING ETHICS REVIEW



Assign a responsible person/team to monitor AI ethics.



Involve cross-functional stakeholders (legal, CX, IT, DEI) in periodic reviews.

YOURCXC |

**FIX THE EXPERIENCE.
GROW THE REVENUE.**

**YOURCXC.COM
EXPERIENCE@YOURCXC.COM**