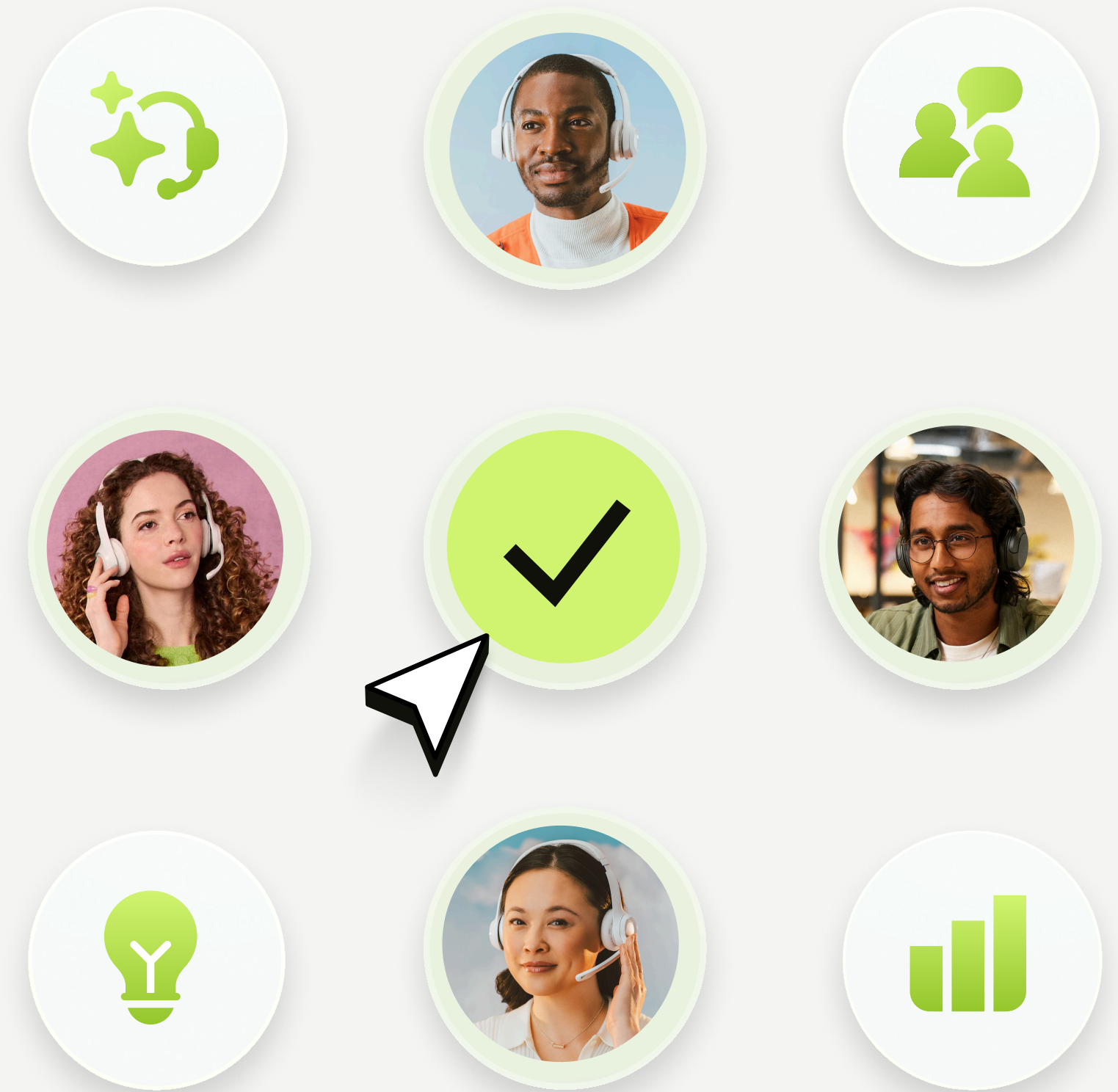# zendesk

DIGITAL WORKSHOP

AI masterclass

The CX leader's guide to AI: Adopt and automate with confidence

Your quick guide to adopting AI and accelerating your path to automation

Introduction

Today's customers are AI savvy. They recognize AI's potential to fully resolve their issues. And they want brands to deliver advanced, AI-powered experiences. They're also clear in their expectations: 81% of consumers believe AI should be part of modern customer service, and 61% expect more personalized service with AI.

Forward-thinking companies are responding in kind, offering instant, 24/7 replies across all service options, providing personalized and contextually relevant answers, and taking proactive action to solve problems on customers' behalf—all thanks to the power of AI.

These companies know that deploying AI effectively isn't just about meeting customer expectations—it's about keeping pace with a new standard of excellence.

This playbook will build on that new standard, empowering you to successfully adopt AI, accelerate your path to automation with AI agents, and scale impact across your CX organization.

Whether your company is just getting started with AI or actively scaling your AI solutions, you'll gain the guidance and resources you need to design a clear roadmap to launch or advance your AI journey.

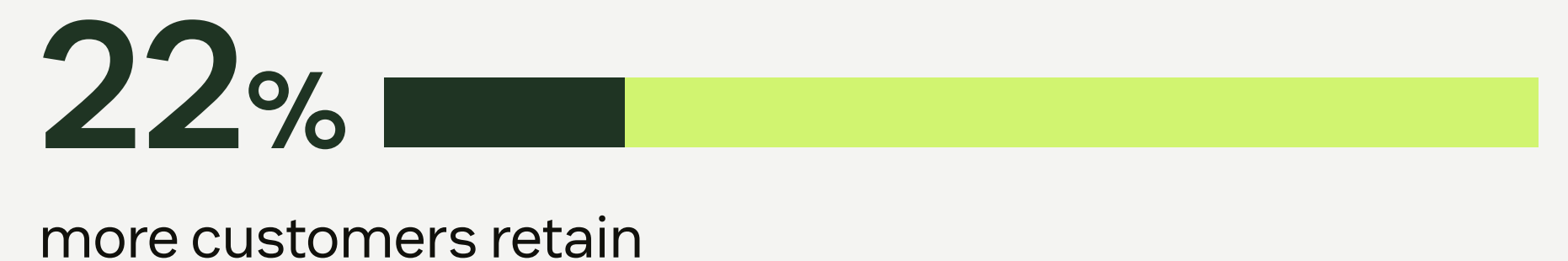Let's get started.

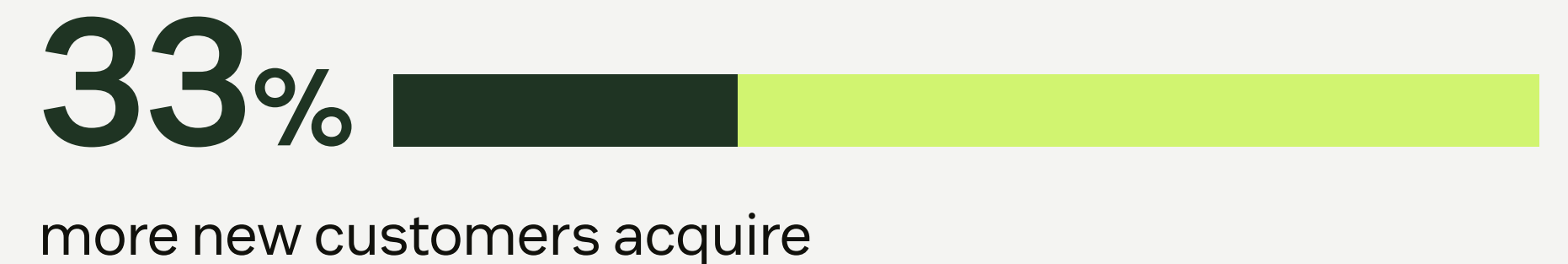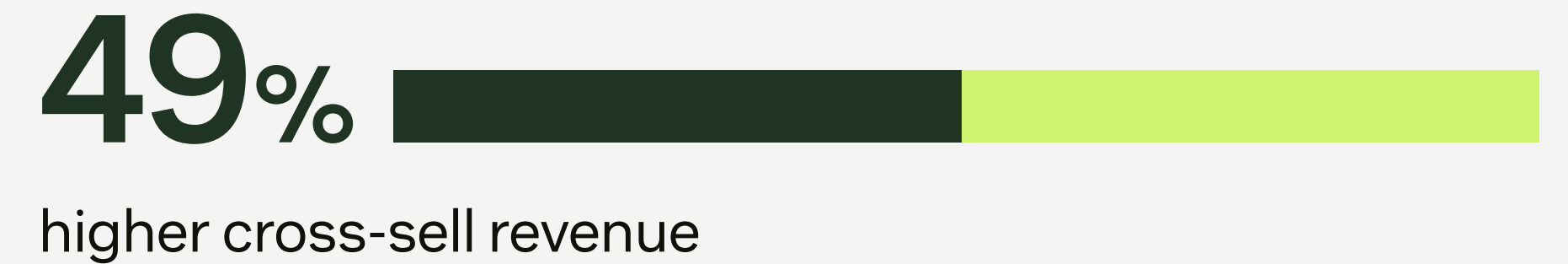## Companies that use AI effectively:

49%
higher cross-sell revenue

33%
more new customers acquire

22%
more customers retain

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01. Building an AI adoption plan

Every company's AI journey is different.

If you're just getting started with AI, you might have a structured knowledge base in place; you might not. Either way, your first steps will focus on building out foundational elements.

On the other hand, if your company has an established knowledge base, clearly defined KPIs for measuring AI impact, and a dedicated team of stakeholders responsible for AI adoption, you might be ready to optimize your processes or focus on measuring and continuously improving your AI implementation.

Identifying where to start or expand

Regardless of where you are on your journey, take a moment to consider our three foundational AI use cases and identify which outcomes and goals you want to achieve.

We advise you to start with one use case—you can expand to others as you scale your AI strategy.
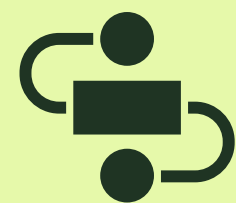
Automate

If you want to Improve your customer experience and deliver exceptional service at scale

And achieve results like:

Automate 80% or more of your interactions— allowing your team to dedicate their expertise and creativity to driving your business forward

Optimize

Improve your admin experience and make it easier to enhance your service workflows

And achieve results like:

Reduce **up to 85%** in operational costs

Assist

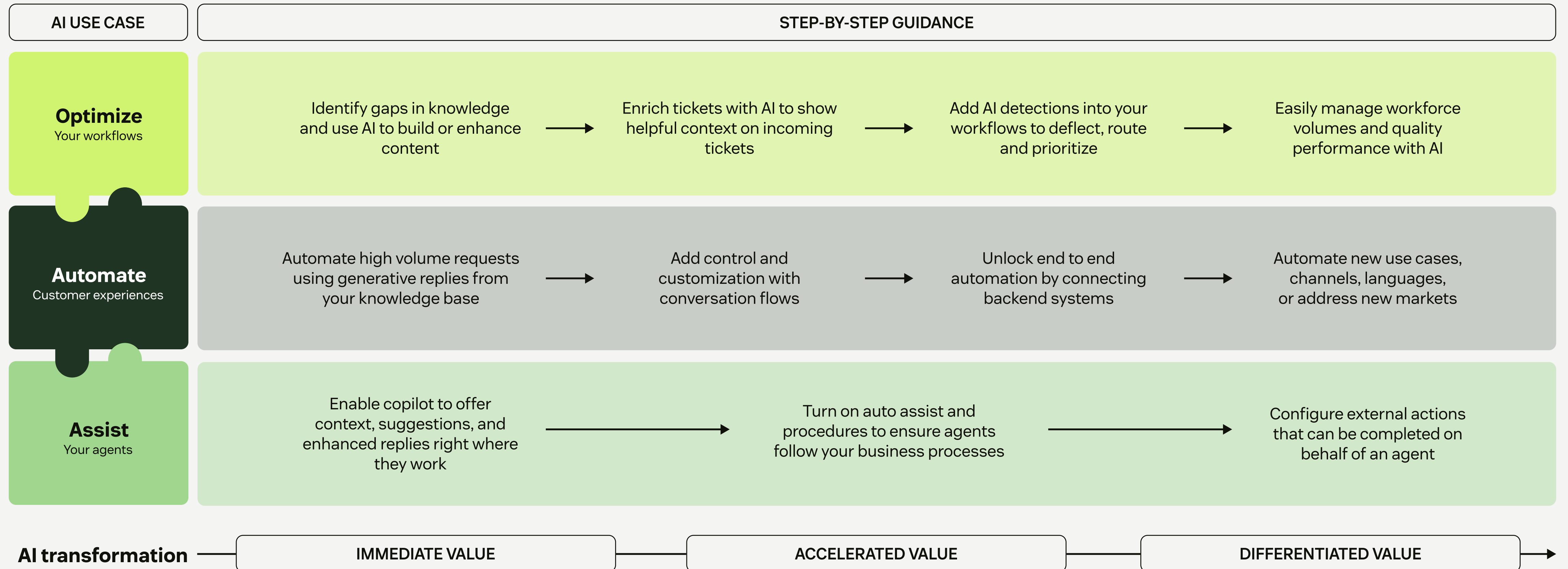**Improve your agent experience** and increase their productivity

And achieve results like:

Increase agent productivity by **20%** and give agents up to **50%** of their time back to solve more complex and high-touch issues

Not sure which use case is for you? In industries where accuracy and compliance are paramount—such as finance and healthcare—many companies begin with Assist to give their agents AI-powered guidance to maintain quality and regulatory standards. Meanwhile, retail and software companies—who have high, repetitive volume—often start with Automate.

Now that you've chosen a use case, take a look at the below roadmap. Don't get bogged down with the step-by-step guidance just yet—we'll cover that in the next chapter.

Your AI roadmap:

AI USE CASE	STEP-BY-STEP GUIDANCE			
Optimize Your workflows	Identify gaps in knowledge and use AI to build or enhance content →	Enrich tickets with AI to show helpful context on incoming tickets →	Add AI detections into your workflows to deflect, route and prioritize →	Easily manage workforce volumes and quality performance with AI
Automate Customer experiences	Automate high volume requests using generative replies from your knowledge base →	Add control and customization with conversation flows →	Unlock end to end automation by connecting backend systems →	Automate new use cases, channels, languages, or address new markets
Assist Your agents	Enable copilot to offer context, suggestions, and enhanced replies right where they work →	Turn on auto assist and procedures to ensure agents follow your business processes →	Configure external actions that can be completed on behalf of an agent	

AI transformation — IMMEDIATE VALUE — ACCELERATED VALUE — DIFFERENTIATED VALUE →

SEAT GEEK

Ticketing platform SeatGeek wanted to **improve self-service and reduce response times** without sacrificing support quality. To address high-volume and time-sensitive questions—like, **"Where are my tickets?"**—they looked to Zendesk.

57,000 💬

In less than six months, they've **automated over 57,000 conversations**, boosting both their deflection and custom resolution rates.

Getting ready to launch

Now that you've identified your use case and reviewed your AI roadmap, you're one step closer to launching. But before you launch, there are a few foundational elements to consider.

First, **understand your baseline and needs.** Doing so will help ensure alignment across the business, making it easier to define where you want to go and quantify the positive impact of your investment.

Second, think about what it will take to **prepare your business for change.** While AI is intended to make your team's lives easier, change requires enablement. Empower your team to take advantage of and start using these time-saving tools to improve both the agent and customer experience.

Think through:

Data and metrics

Acknowledge where you are today and where you want to be in **terms of results.**

Team structure

Structure your team based on their skills and needs to optimize performance.

Customer experience

Consider the steps required to **drive an ideal customer experience** with your business.

Consider how you will:

☐ **Help your team view AI as a partner:** Instill the belief that AI exists to help agents and clearly communicate the benefits that they can expect.

☐ **Build trust:** Ensure agents know what to do and what's expected of them. This means designing the right training and testing so both you and your agents can realize the benefits of AI and avoid some of the pitfalls.

☐ **Communicate:** A strong communication plan is key in driving usage and deeper adoption of what you are rolling out.
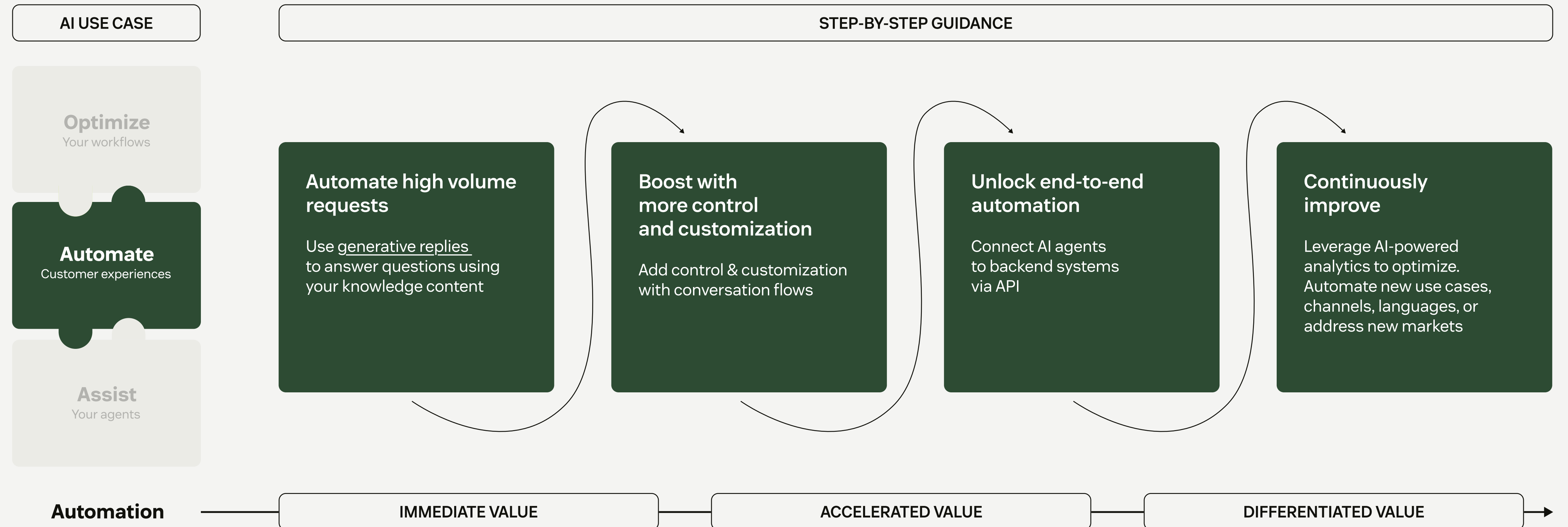
☐ **Continuously improve:** AI is not something you set and forget. It's important you develop a process where you regularly refine your operations to continuously improve.
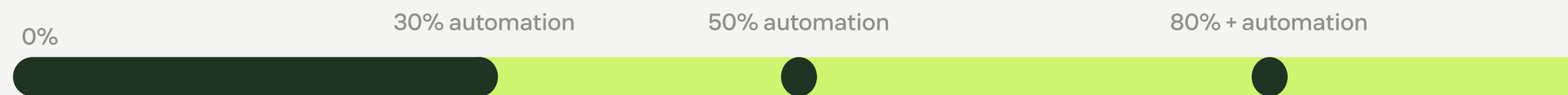
02. Scaling with AI agents

Now it's time to get tactical about your roadmap. To demonstrate, we'll zoom in on the step-by-step guidance for Automate.

Zendesk AI tools are built to improve your customer experience—allowing you to consistently deliver exceptional service at scale and automate 80% or more of your interactions. Let's take a closer look at each step and how it accelerates your path to 80% automation.

Action Steps for Automate

AI USE CASE	STEP-BY-STEP GUIDANCE

Optimize
Your workflows

Automate
Customer experiences

Assist
Your agents

Automate high volume requests

Use generative replies to answer questions using your knowledge content

Boost with more control and customization

Add control & customization with conversation flows

Unlock end-to-end automation

Connect AI agents to backend systems via API

Continuously improve

Leverage AI-powered analytics to optimize. Automate new use cases, channels, languages, or address new markets

Automation → IMMEDIATE VALUE — ACCELERATED VALUE — DIFFERENTIATED VALUE →

1. Automate high-volume requests

0% — 30% automation — 50% automation — 80% + automation

Knowledge is the foundational building block to delivering accurate resolutions. Connecting your AI agent to your trusted knowledge base can help you deliver instant, accurate responses in your unique brand tone, as well as across any language or channel.

Best of all, it can help you achieve up to 30% automation on day one.

2. Boost with more control and customization

0% — 30% automation — 50% automation — 80% + automation
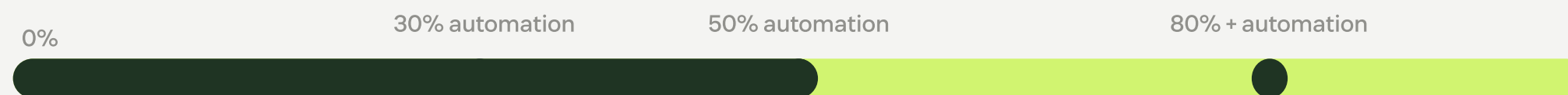
To start scaling and accelerate your automation journey, you need your AI agents to take on more complex issues. With leading AI solutions, you don't have to build complex flows. You define the outcome, and the AI agent figures out how to get there—asking clarifying questions, taking action, and adapting to the conversation in real time.

Whether it's verifying a customer, applying a refund policy, or triggering a multi-step workflow, the agent follows the guidelines you provide. When you need the best of both worlds, hybrid flows provide the flexibility of generative AI and the precision of structured conversation design.

This enables up to 50% automation.

3. Unlock end-to-end automation

0% — 30% automation — 50% automation — 80% + automation
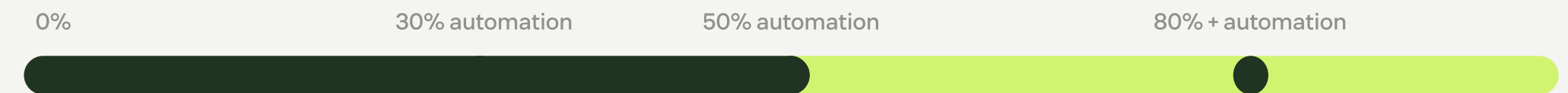
AI agents shine when they can resolve issues from start to finish.

Empower your AI agent to take action by connecting it to your tools and systems—like your order management tools and billing tools—so it can resolve requests independently. When integrated deeply into your customer experience platform, AI agents can perform any action a human agent can.

4. Continuously improve

0% — 30% automation — 50% automation — 80% + automation
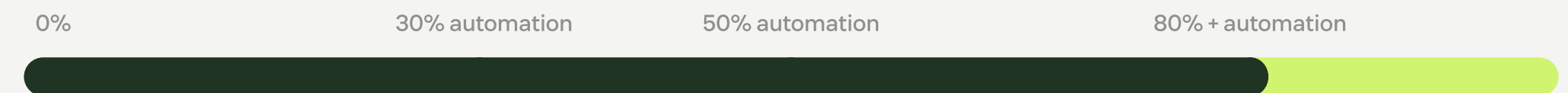
With greater visibility into how your AI agents are performing, you can understand what's working well—and where you need to iterate.

By putting your AI agents at the heart of your CX decision-making, you might discover new use cases, new channels, or even new markets—helping you reach 80%+ automation while delivering great customer experiences.

CUSTOMER SPOTLIGHT:

TransferGo is a fast-growing global fintech company on a mission to make international money **transfers simple, affordable**, and frictionless across 160 countries. In their high-volume, high-expectation world, they needed a way to scale support without sacrificing quality.

65%
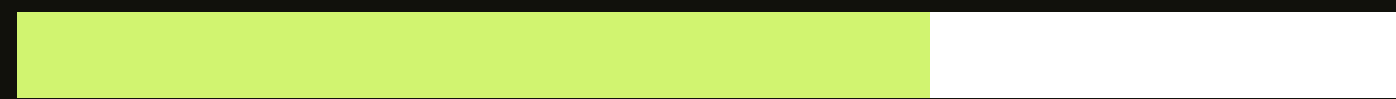
With Zendesk AI agents, they've automated 65% of customer requests—boosting customer satisfaction in the process.

Next steps

It's time to think even bigger and shape your future vision.

- [ ] Brainstorm a list of potential expansions or advanced scenarios (e.g., connecting to backend systems).

- [ ] Consider which performance metrics you'll track (e.g., resolution rate, CSAT, handle time).

- [ ] Analyze which of your use cases require more control and customization.

- [ ] Think about where else you could deploy AI (think: new channels, new regions) once you see success.

- [ ] Brainstorm 1-2 potential next-level automations you could deploy after initial success.

03. Leading the future of AI in CX

Armed with actionable frameworks and expert guidance, you're ready to move forward in your AI journey. Now, you need the right partner.

Only Zendesk has the expertise to help your organization navigate its AI-powered CX transformation, equipping you with service-specific AI solutions, like AI agents, workforce management (WFM), Copilot, and QA, to support your journey.

With over **10,000 AI customers worldwide** and a 300-strong R&D team dedicated to advancing Agentic AI, you can be confident that Zendesk AI-powered CX will keep evolving—and staying one step ahead.

Together, we will help you adapt, innovate, and drive unprecedented business results.

Ready to put these ideas into action?

Grab the worksheets that turn insights into next steps:

Build Your AI Adoption Plan

Assess AI maturity, pinpoint high-impact use cases, and outline a launch-ready adoption plan

Download worksheet

Scale with AI Agents

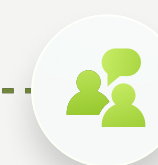Assess automation, prep your knowledge base, and map where AI agents will drive the biggest wins

Get the worksheet

Ready to accelerate your AI roadmap?

Discover how Zendesk can help

Discover

Start with AI adoption,

scale with AI agents