DAY 30 — AI FOR CUSTOMER SERVICE & SALES

Business Automation, Sales Support, Customer Experience, Predictive Analytics & Service Workflows

Day 30: Course topics and practical workflow

Syllabus

Course topics from the module:

- Automating business processes
- AI in marketing and sales
- Enhancing customer experience with AI
- Predictive analytics for business
- AI in supply-chain management
- Financial forecasting with AI

One complete task:

Build a lead-to-customer workflow for an online AI training course: inquiry → response → follow-up → prediction → report.

Workflow:

Step 1: Define customer journey
Step 2: Identify repetitive tasks
Step 3: Draft sales script and FAQ response
Step 4: Create follow-up sequence
Step 5: Track leads in a simple sheet
Step 6: Analyze likely conversion and customer needs
Step 7: Improve service and report results

Important: AI drafts need human review before messages are sent to customers.

Core concept:

Business process automation uses software and AI to complete repeatable tasks with fewer manual steps.

Good automation tasks:

- Replying to common questions
- Sorting inquiry emails
- Updating lead lists
- Sending confirmation messages
- Scheduling reminders
- Summarizing customer feedback

Human-only tasks:

- Handling serious complaints
- Approving refunds or contracts
- Making high-impact decisions
- Solving unusual customer situations

Step-by-step: map a process

Step 1: Select one repeated task: “Reply to course inquiries.”

Step 2: Write the trigger: “New inquiry form submitted.”

Step 3: List the input: name, course interest, question.

Step 4: List the AI task: categorize question and draft reply.

Step 5: List the action: save lead and send approved reply.

Step 6: Set human review rule: check pricing, refund, and complaint messages.

Prompt: “Create a simple automation map for an online training center: new inquiry, AI category, CRM/Sheet update, response draft, human approval.”

Core concept:

AI can support sales by organizing lead information, drafting personalized messages, suggesting next actions, and summarizing customer needs.

Sales funnel:

- Lead: person shows interest
- Qualified lead: person likely matches the offer
- Prospect: active sales conversation
- Customer: makes purchase
- Retention: stays, returns, or refers others

AI support examples:

- Draft sales emails
- Create FAQ answers
- Summarize calls/chats
- Suggest follow-up timing

Step-by-step: create a sales message

Step 1: Define product: “AI Skills Bootcamp.”

Step 2: Define audience: “University students.”

Step 3: Define need: “Save time on study and build work skills.”

Step 4: Add two real benefits.

Step 5: Add one CTA: “Book a free consultation.”

Step 6: Ask AI for a short, polite message.

Step 7: Review facts, pricing, dates, and tone before use.

Prompt: “Write a friendly 70-word sales message for university students about an AI Skills Bootcamp. Mention practical writing, research, and content skills. End with: Book a free consultation.”

Core concept:

Customer experience is how customers feel at every stage: inquiry, purchase, onboarding, support, and follow-up.

AI can improve experience by:

- Providing faster first responses
- Offering 24/7 basic FAQ support
- Routing issues to the correct team
- Personalizing help using approved context
- Summarizing common complaints

Customer-service principle:

Fast is useful; correct, respectful, and safe is essential.

Step-by-step: create a basic FAQ workflow

Step 1: Collect 10 common customer questions.

Step 2: Group them: course info, price, schedule, payment, certificate, technical support.

Step 3: Write approved answers from real policy documents.

Step 4: Ask AI to make answers clearer and shorter.

Step 5: Add escalation line: “For payment/refund issues, our team will assist you.”

Step 6: Test five questions and check accuracy.

Prompt: “Rewrite these approved FAQ answers in simple, friendly English. Keep every fact unchanged. Add an escalation note for refunds and payment problems.”

Follow-up purpose:

Help interested leads decide by answering questions—not by sending repeated pressure messages.

Basic 3-message sequence:

- Message 1: thank you + offer information
- Message 2: benefit + common question
- Message 3: deadline or consultation CTA

Sales-script structure:

Greeting → understand need → recommend solution → handle question → CTA

Good practice:

Use customer's stated interest; do not invent personal details.

Step-by-step: create a 3-message follow-up

Step 1: Write the lead's course interest.

Step 2: Draft Message 1 within 60 words.

Step 3: Draft Message 2 with one course benefit and FAQ answer.

Step 4: Draft Message 3 with a clear action.

Step 5: Add a polite opt-out line if needed by policy.

Step 6: Review messages for correct claims and no false urgency.

Prompt: "Write a 3-message follow-up sequence for a lead interested in an AI Skills Bootcamp. Use friendly professional tone. Each message under 60 words. Include one CTA in each message."

Core concept:

Predictive analytics uses past data to estimate what may happen next, such as likelihood of purchase, churn, demand, or support volume.

Examples:

- Lead scoring: who is most likely to enroll?
- Churn risk: who may stop using a service?
- Demand forecast: how many course seats may be needed?
- Support forecast: when may inquiry volume increase?

Important:

A prediction is not a guarantee. It depends on data quality and can be wrong.

Step-by-step: simple lead scoring

Step 1: Create columns in Google Sheets: Lead Name, Price Page Visits, Form Submitted, Webinar Attended, Score.

Step 2: Assign simple points: price page = 10; form = 30; webinar = 40.

Step 3: Add points for each lead.

Step 4: Set categories: High = 60+, Medium = 30–59, Low = below 30.

Step 5: Ask AI to summarize priority leads.

Step 6: Verify scores manually before contacting customers.

Prompt: “Using this lead-score table, group leads into High, Medium, and Low priority. Explain the rule used and suggest one appropriate next action for each group.”

AI in supply chain:

- Forecast demand for products or course seats
- Track inventory/material needs
- Identify delivery delays
- Plan staffing and resource availability

AI in financial forecasting:

- Estimate future revenue
- Estimate marketing cost
- Compare best, base, and worst scenarios
- Identify cash-flow risks

Rule:

Use actual historical data where possible. State every assumption clearly.

Step-by-step: simple course revenue forecast

Step 1: Record past monthly enrollments: 20, 25, 30.
Step 2: Set course fee: 2,000 BDT.
Step 3: Create base forecast: 30 enrollments next month.
Step 4: Create optimistic forecast: 35 enrollments.
Step 5: Create downside forecast: 25 enrollments.
Step 6: Calculate revenue: enrollment × fee.
Step 7: Ask AI to produce a scenario table and list assumptions.

Prompt: “Create base, optimistic, and downside revenue forecasts using 25, 30, and 35 expected enrollments and a 2,000 BDT course fee. Show calculations and assumptions.”

Complete task: lead-to-customer workflow

Complete Task

Task brief:

Create an AI-assisted workflow for an online AI Skills Bootcamp inquiry.

Scenario:

“A student completes a website form asking about course schedule, course fee, and certificate.”

Required outputs:

- One lead record in a spreadsheet
- One AI-generated FAQ response draft
- One 3-message follow-up sequence
- One lead score and next action
- One short manager report

Full completion process:

Step 1: Create a Sheet with lead name, interest, question, score, status, next action.

Step 2: Copy only non-sensitive inquiry details into your AI prompt.

Step 3: Generate a draft answer using verified course facts.

Step 4: Review schedule, fee, and certificate claims manually.

Step 5: Save approved reply; mark status as “Responded.”

Step 6: Create 3 follow-up messages for Day 1, Day 3, and Day 7.

Step 7: Score lead based on form submission and stated interest.

Step 8: Choose next action: call, consultation, nurture, or support escalation.

Step 9: Write a 3-bullet report for manager.

Prompt: “Using these verified course details [paste facts], write a helpful reply to a student asking about schedule, fee, and certificate. Use simple English. Do not invent information. End by offering a free consultation.”

Final quality check and submission

Final Review

Quality checklist:

- Facts, pricing, policies, and dates are verified
- Customer message is respectful and clear
- Sensitive information is not pasted into public AI tools
- AI output has human approval before sending
- FAQ provides escalation for complex issues
- Lead score follows documented rules
- Forecast includes assumptions and scenarios

Common fixes:

- Wrong facts: replace with approved policy text
- Generic reply: add verified customer need/context
- Pushy message: use helpful tone and one clear CTA

Submission requirements:

1. Lead tracking sheet or table.
2. One reviewed customer response.
3. Three follow-up messages.
4. Lead score with next action.
5. Scenario forecast table.
6. Three-bullet manager report.

Exit ticket:

- Which task should always have human approval?
- What data should not be placed in a public AI prompt?
- What does a lead score help a sales team decide?

Course alignment: Day 30 syllabus—business automation, AI in marketing/sales, customer experience, predictive analytics, supply-chain management, and financial forecasting.