DAY 30 — AI FOR CUSTOMER SERVICE & SALES

Theoretical Logic: Why to Use AI, Where to Use It, and How to Use It Responsibly

20-Slide Intermediate Trainee Lecture

Core Topics: Process Automation, Marketing & Sales AI, Customer Experience, Predictive Analytics, Supply Chain, Financial Forecasting

Tools Mentioned: Claude AI, Intercom AI, Zendesk AI, HubSpot AI, ChatGPT/Gemini, Google Sheets

By the end of Day 30, trainees can:

- Explain the business logic behind AI in service and sales.
- Identify suitable and unsuitable tasks for automation.
- Design a basic customer-service and sales workflow.
- Interpret simple lead, demand, and revenue predictions.
- Apply human oversight, privacy, and accuracy controls.

Day 30 syllabus coverage:

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

Lecture logic:

1. Business problem
2. AI capability
3. Business benefit
4. Where it fits in workflow
5. Human control
6. Measurement of results

Core principle:

AI is valuable when it improves speed, consistency, or insight while people remain responsible for important decisions and customer outcomes.

Core concept:

Customer service solves a customer's problem. Sales helps a qualified customer choose and buy a solution. Both depend on accurate information and trust.

Customer journey:

- Awareness: customer discovers brand
- Inquiry: customer asks a question
- Evaluation: customer compares options
- Purchase: customer pays or registers
- Onboarding: customer starts using service
- Support: customer receives help
- Retention: customer returns or refers others

Where AI fits:

- Awareness: content ideas and ad copy
- Inquiry: FAQ chatbot and reply drafting
- Evaluation: personalized product/course information
- Purchase: lead routing and sales follow-up
- Onboarding: welcome messages and reminders
- Support: ticket classification and summaries
- Retention: feedback analysis and churn alerts

Logic: AI removes repetitive work so staff can focus on complex needs and relationships.

Why businesses use AI in service and sales

Why use AI:

- Speed: answer routine questions faster.
- Scale: handle more inquiries without adding the same amount of staff.
- Consistency: use approved tone and policy information.
- Personalization: adapt messages using approved customer context.
- Insight: identify patterns across chats, tickets, sales, and feedback.
- Availability: provide basic support outside office hours.

Business logic:

If response time decreases and answer quality stays high, customer satisfaction and conversion opportunity can improve.

Benefits must be measured:

- First-response time
- Resolution time
- Customer satisfaction score
- Ticket deflection/automation rate
- Lead-to-customer conversion rate
- Revenue per campaign

Rule:

Automation is not success if customers receive fast but incorrect answers. Accuracy and escalation must be designed first.

Automation logic: trigger, process, action

Core automation model:

- Trigger: an event starts the workflow.
- Input: information received by the system.
- Process: AI classifies, summarizes, or drafts.
- Action: system updates a record, alerts staff, or prepares a response.
- Review: a person checks important output.

Example:

Trigger: new course inquiry form.
Input: learner name, interest, question.
Process: AI identifies question type.
Action: create lead record and response draft.
Review: staff verifies price/schedule before send.

Where to use this model:

- Website contact forms
- Incoming emails
- Social-media direct messages
- Live-chat questions
- Customer feedback surveys
- Sales meeting notes

How to use:

Step 1: map the existing manual process.
Step 2: identify repeatable decision points.
Step 3: automate low-risk steps first.
Step 4: define escalation for exceptions.

What should and should not be automated

Good candidates for AI automation:

- Repeated questions with approved answers
- Appointment reminders
- Lead categorization
- Ticket tagging by topic/language/sentiment
- Summarizing long customer conversations
- Drafting first responses

Poor candidates for fully automatic action:

- Refund approval
- Legal, medical, or financial advice
- Serious complaint resolution
- Firing/hiring decisions
- Contract approval
- Customer requests containing sensitive data

Logic for selection:

Automate when task is frequent, rule-based, low-risk, and easy to verify.

Keep human control when task is rare, high-impact, emotional, ambiguous, regulated, or requires judgment.

Example:

AI may draft a refund-policy answer. A human should approve an actual refund exception.

Rule:

Use “human-in-the-loop” for outgoing customer messages until the organization has tested accuracy and safety.

Where to use AI in marketing:

- Audience research and content ideas
- Ad-copy variations
- Landing-page drafts
- Campaign-performance summaries
- Feedback and review analysis

Where to use AI in sales:

- Lead qualification
- Sales-email drafts
- Call/meeting summaries
- Proposal outlines
- Objection-handling suggestions
- Next-best-action recommendations

Why use AI:

It helps teams respond faster, organize information, and create several message variants without starting from zero.

How to use responsibly:

- Supply verified product facts.
- State audience, tone, and CTA clearly.
- Review every claim before publishing/sending.
- Never invent customer-specific details.

Example prompt:

“Write a 70-word friendly message for students interested in an AI Skills Bootcamp. Use these verified facts: [facts]. End with: Book a free consultation.”

Sales funnel logic:

- Lead: shows basic interest.
- Marketing-qualified lead: matches target profile or engages with content.
- Sales-qualified lead: has need, fit, and readiness to speak/buy.
- Opportunity: active discussion or proposal.
- Customer: completed purchase.

AI role:

AI can collect interaction signals, summarize needs, score priority, and suggest follow-up—not make the final decision alone.

Lead signals:

- Visited pricing page
- Submitted inquiry form
- Downloaded brochure
- Attended webinar
- Replied to sales email

How to use:

Step 1: define transparent scoring rules.

Step 2: record signals in CRM/Sheet.

Step 3: use AI to summarize and group leads.

Step 4: sales staff verify and choose next action.

Example: webinar + form = high-priority follow-up; one blog visit = nurture, not pressure.

Lead scoring: simple predictive logic

Core concept:

Lead scoring estimates which leads are more likely to convert based on observable behaviors and approved criteria.

Simple rule-based example:

- Pricing-page visit = 10 points
- Form submitted = 30 points
- Webinar attended = 40 points
- Replied to email = 20 points

Priority bands:

- High: 60+ points
- Medium: 30–59 points
- Low: below 30 points

Why use it:

Limited sales time should be allocated first to leads with stronger intent signals.

Where to use:

CRM, Google Sheets, HubSpot, sales inbox, or automation tools.

How to use:

Step 1: create columns for signals and score.

Step 2: calculate score consistently.

Step 3: assign next action by band.

Step 4: compare prediction with real conversion outcomes.

Limit: behavior scores can be wrong; do not treat a low score as proof someone will never buy.

Customer experience (CX):

The customer’s perception of every interaction with a brand before, during, and after purchase.

What creates good CX:

- Fast response
- Accurate information
- Respectful tone
- Easy escalation to a person
- Clear next steps
- Consistent service across channels

AI service logic:

AI handles routine work; people handle empathy, exceptions, and accountability.

Where AI improves CX:

- 24/7 basic FAQ answers
- Language translation
- Conversation summaries for agents
- Suggested response drafts
- Routing urgent complaints
- Detecting negative sentiment

Example:

A chatbot answers “What are the course dates?” from approved content, then routes “I was charged twice” to a human finance-support agent.

Rule:

Customers must not be trapped in a bot loop. Provide a clear human-help option.

Core concept:

A knowledge base is a controlled collection of approved answers: policies, FAQs, product details, and troubleshooting steps.

Why it matters:

An AI support agent is more reliable when it retrieves from approved, current knowledge rather than improvising answers.

Knowledge-base requirements:

- Correct and current facts
- Clear titles and headings
- Short answer blocks
- Named content owner
- Review/update date
- Escalation rules

Where to use:

- Website help center
- In-product help
- Chatbot response source
- Agent response templates

How to use:

Step 1: collect 20 top customer questions.
Step 2: write approved answers from policy.
Step 3: add “when to escalate” instruction.
Step 4: connect/test AI with these sources.
Step 5: review inaccurate answers weekly.

Platforms such as Zendesk and Intercom describe AI agents that use knowledge content to answer customer questions and hand complex cases to people.

Chatbot logic:

Chatbot receives question → identifies intent → retrieves approved information → responds or routes to a human.

Agent-assist logic:

Human agent receives question → AI summarizes history and suggests a reply → human edits/approves → response sent.

Why use both:

Chatbots reduce routine volume. Agent assist improves human speed and consistency for complex cases.

Where to use:

Website chat, email, social messaging, phone-support summaries, internal help desks.

How to use safely:

Step 1: define allowed intents: schedule, product info, password reset, order status.

Step 2: define blocked/escalated intents: refunds, legal threat, payment dispute, crisis.

Step 3: provide approved knowledge articles.

Step 4: test 20 real questions before launch.

Step 5: monitor failure and escalation rates.

Example escalation message:

“I will connect you with our support team for help with this payment issue.”

Core concept:

Sentiment analysis classifies customer text as positive, negative, neutral, or mixed. Topic analysis groups feedback by subject.

Where to use:

- Product reviews
- Support tickets
- Survey comments
- Social-media mentions
- Call/chat transcripts

Why use it:

It helps a team identify repeated problems that may be hidden inside hundreds of comments.

How to use:

Step 1: remove personal/sensitive data.

Step 2: provide feedback text in a secure approved process.

Step 3: ask AI to classify topic and sentiment.

Step 4: count repeated issues.

Step 5: verify a sample manually.

Step 6: assign an owner and corrective action.

Example prompt:

“Classify these anonymized comments by Topic, Sentiment, Urgency, and Recommended Action. Do not invent facts; quote the original comment ID.”

Core concept:

Predictive analytics uses historical data and patterns to estimate a future outcome.

Business questions:

- Which leads may convert?
- Which customers may leave?
- How many support tickets may arrive next week?
- How many seats/products may be required next month?
- What revenue range is likely?

Logic:

Past behavior + current signals → estimated future outcome.

Why use it:

Predictions help teams prepare resources and prioritize action before a problem or opportunity becomes urgent.

How to use:

Step 1: define one outcome to predict.
Step 2: collect relevant historical data.
Step 3: check data quality and bias.
Step 4: create simple baseline prediction.
Step 5: compare forecast to actual result.
Step 6: improve the model/rules over time.

Rule:

A prediction is a probability, not a fact or guarantee.

Churn:

When a customer stops buying, using, or renewing a service.

Possible churn signals:

- Lower product usage
- Repeated unresolved complaints
- Payment failure
- Fewer website/app visits
- Negative feedback
- No response to onboarding messages

Why use AI:

AI can identify patterns across many customers faster than manual review.

Where to use:

Subscription services, online courses, e-commerce repeat buyers, SaaS products, membership programs.

How to use:

Step 1: define “inactive” or “at-risk.”
Step 2: list approved signals.
Step 3: group customers by risk level.
Step 4: offer helpful support, not unwanted pressure.
Step 5: measure whether retention improves.

Example:

Learner has not opened course for 14 days → send supportive reminder and offer technical help.

Core concept:

Supply chain is the flow of materials, inventory, suppliers, delivery, and fulfillment needed to provide a product/service.

Where AI helps:

- Demand forecasting
- Inventory alerts
- Delivery-delay prediction
- Supplier performance analysis
- Workforce/resource planning

Example for training business:

Forecast class enrollment to prepare trainer hours, classroom seats, printed materials, and support capacity.

Why use it:

Better forecasts reduce stock-outs, waste, unnecessary cost, and customer disappointment.

How to use:

Step 1: record past demand by time period.
Step 2: identify seasonality and special events.
Step 3: create base, high, and low demand scenarios.
Step 4: assign reorder/staffing thresholds.
Step 5: compare expected demand with actual demand.

Limit:

Unexpected events can break past patterns, so managers must review forecasts.

Core concept:

Financial forecasting estimates future revenue, costs, cash flow, or profit using historical information and stated assumptions.

Key formulas:

- Revenue = number of sales × price
- Profit = revenue − total cost
- Cash flow = cash received − cash paid
- Break-even units = fixed costs / contribution per unit

Scenario planning:

- Base case: most likely assumption
- Upside case: better-than-expected result
- Downside case: weaker-than-expected result

Where to use:

Campaign budget plans, course enrollment plans, sales targets, inventory purchases, and staffing plans.

How to use:

Step 1: input real historical sales/cost data.
Step 2: state price and demand assumptions.
Step 3: calculate three scenarios.
Step 4: ask AI to organize the table/explain risks.
Step 5: check every calculation manually.

Example:

30 enrollments × 2,000 BDT = 60,000 BDT expected revenue.

Metrics: measure whether AI is working

Customer-service metrics:

- First-response time
- Average resolution time
- Customer satisfaction (CSAT)
- First-contact resolution
- Escalation rate
- Reopened-ticket rate

Sales metrics:

- Lead-response time
- Qualification rate
- Conversion rate
- Cost per lead
- Revenue per lead
- Follow-up completion rate

How to measure:

Step 1: record baseline before AI launch.

Step 2: select 3–5 metrics only.

Step 3: track weekly/monthly results.

Step 4: compare AI-assisted process with baseline.

Step 5: inspect quality, complaints, and fairness—not only speed.

Logic:

If faster replies create more escalations or complaints, the workflow requires improvement rather than expansion.

Key risks:

- Hallucinated or outdated information
- Incorrect pricing/policy messages
- Customer data leakage
- Biased lead/customer decisions
- Over-automation and poor human handoff
- Unclear accountability

Privacy rules:

- Do not paste NID, card details, passwords, or unnecessary personal data into public AI tools.
- Use approved tools and data-access policies.
- Keep only the data necessary for the task.

Human oversight controls:

Step 1: approve knowledge-base sources.

Step 2: define high-risk escalation rules.

Step 3: require human review for customer-facing exceptions.

Step 4: log AI errors and customer complaints.

Step 5: review results and update workflows regularly.

Final rule:

AI may support a decision or draft a response, but a person/organization remains accountable for the result.

Use AI when:

- Task is repetitive, high-volume, and low-risk.
- Approved information is available.
- Output can be checked easily.
- A measurable business goal exists.

Use people when:

- Decision is high-impact or sensitive.
- Customer is upset or situation is unusual.
- Policy exception, refund, legal, medical, or financial judgment is needed.

Final workflow:

Customer need → AI support → human review when needed → action → measure → improve.

Final practice prompt:

“Act as a customer-service and sales workflow analyst. For an online training center, design a process for course inquiries. Include: trigger, data collected, AI task, approved response source, human escalation rule, lead score, follow-up action, and metrics. Do not use sensitive personal data.”

Exit questions:

1. What makes a task suitable for AI automation?
2. Why is a knowledge base important for a chatbot?
3. Why is a prediction not a guarantee?
4. Which customer situations must be escalated to people?