

# The Guide to Email Automation in B2C Customer Service

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The classic support call is nearly synonymous with general customer service operations. When you think about high-volume customer channels, the first concepts that come to mind are likely long hold times and phones ringing off the hook.

But clearly, email is also a major problem—otherwise you wouldn't be reading this guide. What is it about email that makes it so unmanageable for enterprises?

# 1. Email as the Secret Customer Service Killer

Email is still the most commonly used digital customer service channel—54% of customers have used email customer service channels in the last year.<sup>1</sup>

It really shouldn't be a surprise email became so insanely popular in B2C communication. Email gives customers several key advantages. They want to avoid talking to a rep, and they want to contact the business when it's convenient for them, (often after hours). It also provides a platform for explaining complex problems in greater depth.

Businesses like email for similar reasons. If a customer messages support while all the agents are busy, no problem. Email brings a great deal of muscle to customer service: enabling organizations to quickly address support issues, acquire missing info, gather application data, respond to quote requests... on and on and on.

Email also enabled a major shift. Enterprises turned to email to reduce the high costs of support calls (which average \$12-17 per contact). Processing an email only costs about \$3.25.

But what businesses didn't fully take into account was the sheer volume of emails that would flood their support@company.com inboxes. They weren't prepared for the hundreds of thousands of emails every month or even every week, all requiring review and action.

Call centers are limited by business hours and the number of available agents, but the deluge of email never stops. Therein lies the problem. With email, the cost per contact is cheaper, yes—it's the volume of email that drives up costs and frustrates customers.



Email is still the most commonly used digital customer service channel—**54% of customers have used email customer service channels in the last year.**<sup>1</sup>

1. Forrester, 2018 Customer Service Trends: How Operations Become Faster, Cheaper — And Yet, More Human

# 2. The Cost of Manual Email Processing

Most businesses aren't set up to handle the tsunami of emails in their support, sales and info inboxes. Manual email processing—sifting through, routing and prioritizing these hundreds of thousands of emails—takes a small army, and can create some pretty catastrophic outcomes.

While **41% of customers expect an email response within six hours**, only 36% of businesses respond that quickly and 14% never respond at all.<sup>2</sup>

## Overdue Responses

Communicating at your convenience is the whole point of email. But for businesses fielding thousands of customer queries a day, convenience can quickly become negligence. When customers email in while phones are ringing off the hook and the support desk thinks, "we'll respond later," that "later" sometimes slips into "never."

Heavily-referenced research from Forrester found that:

While 41% of customers expect an email response within six hours, only 36% of businesses respond that quickly and 14% never respond at all.<sup>2</sup>

## Increased OpEx

Reviewing, routing, reading and responding to all those emails gets expensive. A 2019 Gartner Customer Service and Support Leader Poll identified that live channels (phone, live chat, manual email) cost about \$8.01 per contact. Self-service channels (automated email, chatbots, mobile apps, website FAQs) cost around only \$0.10 per contact.

**Customers who have to switch to even one live channel incur a cost that is 80 to 100 times more.<sup>3</sup>**

This behavior—cycling through multiple conversation channels over the course of the customer journey—is called channel switching. Channel switching usually happens because an enterprise doesn't respond to emails quickly enough. Customers will keep trying different outlets (like phone) until they get the help they need.

Analyzing 8,000+ customer journeys, Gartner found that channel switching is an incredibly common problem. Only 9% of customers stay contained in self-service channels.

2. Forrester, US Customer Service And Support Metrics, December 2008

3. Gartner, Does Your Digital Customer Service Strategy Deliver?

## 2. The Cost of Manual Email Processing

Live channels can be necessary for solving complicated or sensitive customer problems, but those kinds of interactions don't make up the majority of inbound conversations. The leaders Gartner surveyed estimated that about 20-40% of live channel queries could be resolved in self-service.

### Reputational Damage

A 2018 PwC study found that negative customer service interactions can turn away even your most loyal customers:

32% of all customers would stop doing business with a brand they loved after one bad experience.<sup>4</sup>

Too many customers walking away with negative experiences affects customer retention, CSAT and NPS scores.

How exactly does email fit into this? Let's say a customer emails your help desk and no one gets around to answering it. A few days later they call your customer service line, and now in addition to dealing with their original problem, they're frustrated because they've been left in the dark.

### High OpEx, Low Agent Productivity

Channel switching multiplies the number of inbound interactions, which translates to higher OpEx and overloaded reps. That one ignored email turned into a long angry call: the customer spends the first part of the call just venting. You're in the hole by two or three minutes simply mitigating complaints—more expensive for you and more stressful for the agent.

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4. PwC, Experience is Everything.

## 2. The Cost of Manual Email Processing

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### Lost Sales

A recent study of the shipping industry found delivery services took **122 hours** (on average) to provide a simple manual spot quote.<sup>6</sup> The longer the turnaround time, the more likely you'll lose the sale to a faster competitor—enterprises using conversational AI can automate quote processing in about 5 hours.

### Data Entry Errors

Let's say you process 100,000 emails a month. Even with an error rate as low as 1%, you've still botched information on 1,000 emails. That's especially dangerous for high contact industries that deal with sensitive customer information, such as healthcare, insurance and finance.



5. **Freightos**, The State of Online Freight Sales 2019.

# 3. How Automation Platforms Cut Email Volume

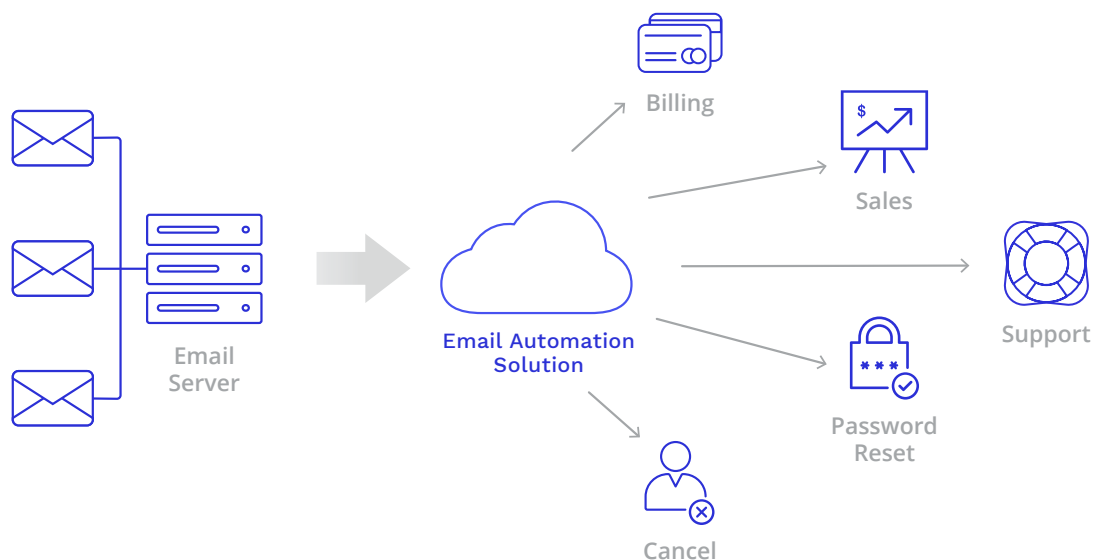
How exactly do email automation platforms offload volume? Most use machine learning to understand content and classify customer emails at scale. Machine learning enables automation solutions to execute on predetermined business rules as well as “write” back to the customer through conversational AI (a type of machine learning that can engage in human-like dialogue).

Machine learning powers email automation platforms to tackle every sticking point in the email lifecycle: from reviewing new messages to capturing important data to replying to the customer.

## Triaging

Email automation technology can be applied to any high-volume inbox (think support@ or info@company.com). Email automation uses conversational AI and language bots to perform three key tasks:

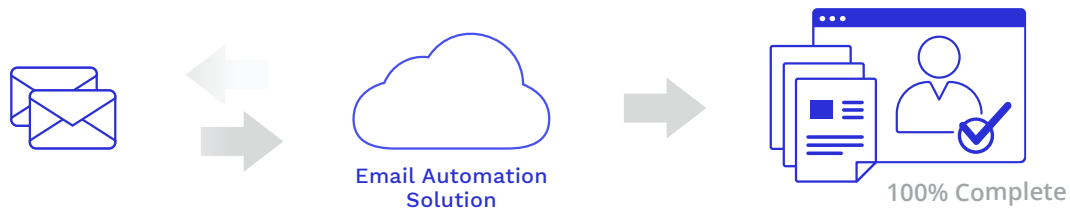
- Scanning each email’s subject line, message and body attachments, including PDFs, spreadsheets, images and other formats
- Classifying and categorizing the main intent based on hundreds of predetermined categories and subcategories
- Routing each email to the appropriate internal group



# 3. How Automation Platforms Cut Email Volume

## Auto Responding

Most email automation systems can automatically respond to the sender, but some can also proactively engage with them. For example, if the system detects that an active email is missing critical information (like the date of birth or account number) it can reach out to the sender to retrieve the details then collate all the required information. In this scenario, the system identified what information was missing based on pre-set rules for that category type.



## Data Extraction and Form Population

If you have email requests that require agents to populate fields in a document (e.g. filing a claim, completing an application), email automation platforms can extract information from attachments and populate the corresponding fields. A few platforms can even integrate with backend systems (see below).

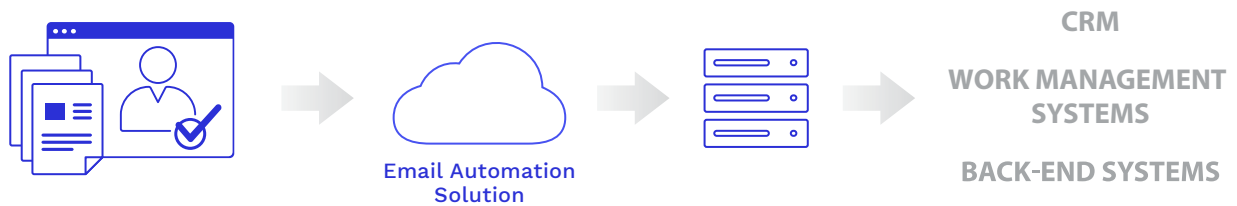




# 3. How Automation Platforms Cut Email Volume

## Back-end Systems Integration

Modern email automation systems can auto-populate the extracted information into back-end systems such as CRMs or work management systems.



## Classifying and Understanding

Email automation systems use conversational AI to understand the intent of a message and machine learning to classify it based on a predetermined rule. Some modern email automation platforms can achieve 80% accuracy (comparable to a human reviewer) immediately and only improve with time.



# 4. Solving Common Customer Service Problems

Now that we've explained how email automation cuts volume, let's see how it puts an end to some of the worst customer service headaches.

<b>Customer Service Problem</b>	<b>Email Automation Solution</b>
Support inbox receives 100,000 emails a month	Scans, reviews, classifies and routes to the right department in seconds
Agents spend valuable time answering the same simple questions over and over	Understands intent of the email and auto-responds contextually
The longer emails sit in the queue, the longer customers wait for responses, the most frustrated they become	Automatically routing emails to appropriate workflows helps questions get answered faster
Customer emails are often missing key information	Proactively respond to the customer to request missing details
Manually extracting relevant data from emails and populating fields takes forever	Automatically extracts critical data and populates form fields in CRMs

# 5. The ROI of Email Automation

Now you know what high volume industries stand to lose without email automation. But what do businesses and customers stand to gain?

Insurance company Irish Life demonstrates a real-life example of email routing at scale. Serving 1.3 million customers, Irish Life sought to automate the hundreds of thousands of emails it receives every year. Every email was opened and read by a member of the email-triage team, who would classify based on Key Business Indicators (KBIs) and forward it to the appropriate team. There the email would be opened and read again, and finally sent to an individual case manager.

**Email automation delivered impressive results for Irish Life:**

**1 second**

processing time

**40%**

fewer resources required

**0**

backlog

Those results are consistent with other large enterprises using email automation:

- Improved C-SAT and NPS scores
- Classified into 100s of categories
- Cut costs by 85%

Enterprises using email automation typically realize a 5x-10x return on investment by dramatically shortening email processing times and improving the customer experience.

But that's not all—there's the long-tail business impacts of email automation to consider.

# 5. The ROI of Email Automation

## Satisfy More Customers

Customers interacting with automated email systems notice a difference. Questions actually get answered and problems are resolved delightfully quickly. They have validation that the issue is being addressed—even if it's just an auto-response that says “we're working on it!” They're no longer left wondering if their email was lost in the ether.

Enterprises using email automation typically realize a **5x-10x return on investment** by dramatically shortening email processing times and improving the customer experience.

## Accomplish More with Fewer Resources

For enterprises always drowning in a flood of messages, email automation delivers the holy grail: inbox zero.

Employees are limited by fatigue, the 40-hour work week and the increasing weight of unanswered emails on their motivation. AI reaches the end of the queue in seconds and looks around for more work. With your email bases covered, employees assigned to the menial review-and-respond-work are freed to focus on more business-critical tasks.

*Enterprises using email automation can not only achieve the impossible (processing hundreds of thousands of emails every month), they can eventually run a nearly hands-free operation, automating 100% of incoming email.*

## Email as a Power Tool, Not a Problem

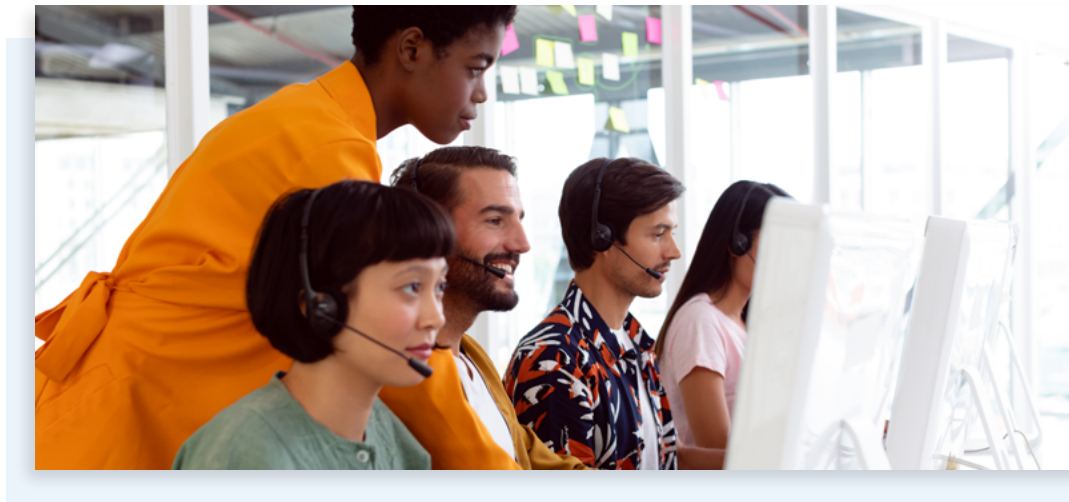
Applying AI transforms email from a major headache into a compelling channel that actually solves issues. Sure, automated data extraction and population knock out time-consuming, error-prone tasks, but they can also enable new business insights.

Data extraction tools pull critical information from customer emails. Data population tools automatically ingest it to your CRMs or systems of record (if your email automation platform integrates with back-end systems). That's already a huge bridge to better understanding your customers. Email automation platforms with reporting dashboards take analytics a step further, delivering real-time stats on automation activity, engagement rates and step-by-step responses.

# 6. How to Implement Email Automation

A good email automation partner will learn about your biggest pain points and current processes before starting a PoC. Work with your partner to set clear KPIs for measuring success. How much delay do you want to eliminate from customer interactions? How much do you want to reduce OpEx or improve NPS scores? Are you aiming to automate 70% of incoming emails? 100%?

Email automation relies on learning the meaning and intent of incoming messages, identifying where critical information is located (e.g. in the body of the email, attached document or image) and understanding what action to take when necessary.



Typically, the business provides an email database which the vendor strips of personally-identifiable information. These anonymized emails are fed to a machine learning model. The model internalizes how your sample emails are structured and categorizes them by different groups (claims, refunds, IT support, etc).

Email automation can achieve an initial level of accuracy comparable with human reviewers fairly quickly—some email automation platforms can reach 80% accuracy right away. Businesses can continue to fine-tune the accuracy and improve efficacy over the next few months: the more emails the AI models processes, the more accurate it becomes.

# 7. About Ushur's Email Automation Platform

Ushur's SmartMail solution can process thousands of incoming emails, attachments and photos; categorize and classify them based on predetermined business rules; auto-respond to each sender and forward each email to the appropriate internal team for processing—all in under a second. SmartMail can also:

- Integrate with back-end and CRM systems, including Salesforce, Zendesk, ServiceNow, Zaron and SpiceCRM
- Provide a reporting dashboard that displays data in real time, including detailed analytics on classified categories, confidence scores and sentiment for every email processed
- Translate and understand multiple languages
- Extract structured and unstructured data from webforms, emails, SMS texts, voice messages, legacy back-end systems and a variety of content formats (PDF, CSV, XML and more)

Cloud-based and AI-powered, the Ushur platform combines conversational AI with intelligent process automation. Companies routinely deploy SmartMail in a matter of weeks, with few IT resources and no need for an external professional services team. Thanks to Ushur's drag-and-drop interface and iterative approach, setup and training happens in hours instead of months.

## Ready to transform email?

[Learn how SmartMail works](#) or [Get a demo](#)

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