



Messaging

Current and future state

Top issues



Confusing sales pitches

Need a better way to communicate and visualize our home product at the right time in the conversation



Low quality grammar

Likely impacts a willingness to consider an upsell opportunity



Sluggish response times

No tools are **actively** supported to help the experts craft a message.

Vision

**Improve the customer experience through
efficient, effective expert tools**



Sales

“Do I trust this?”

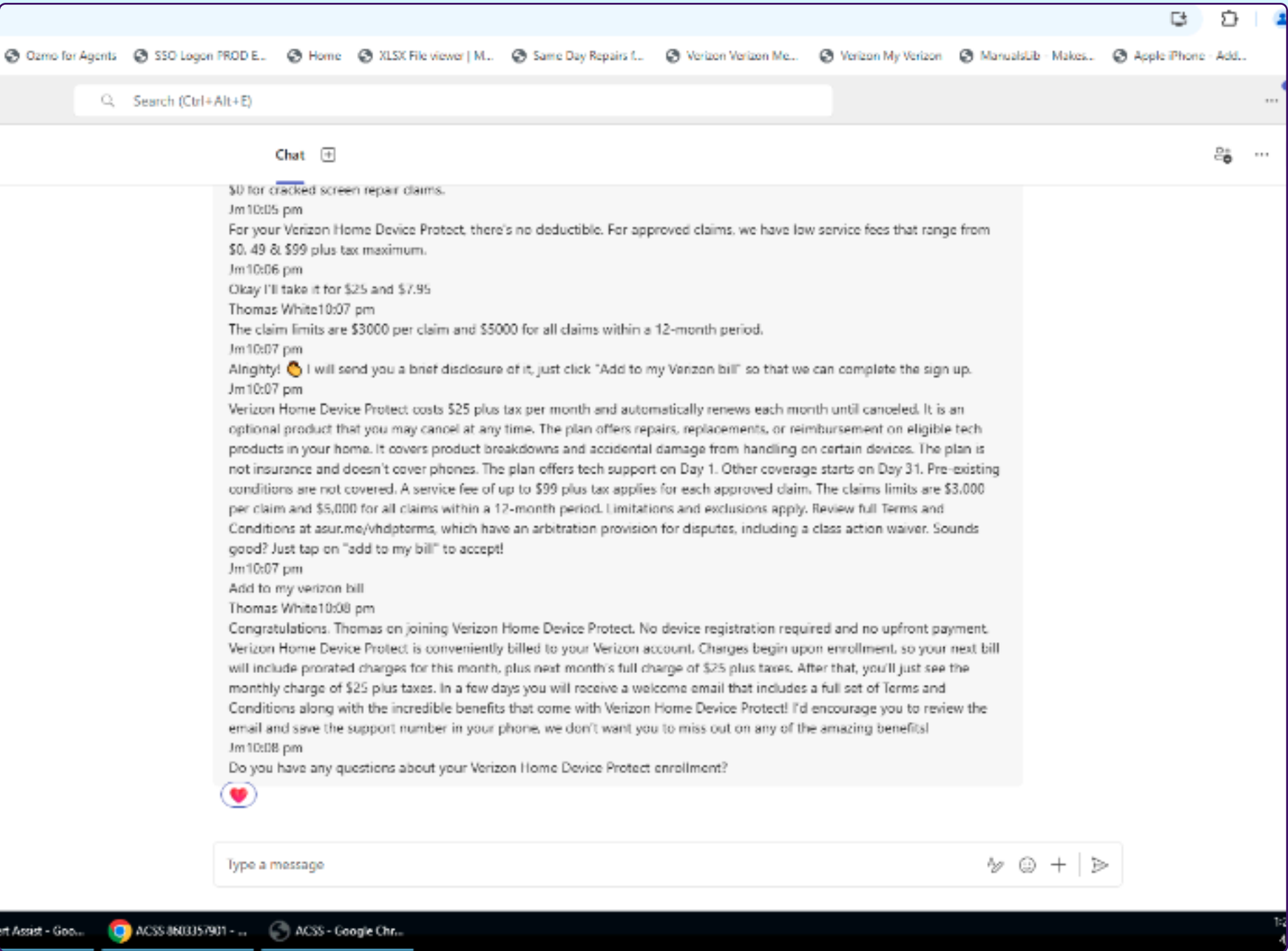
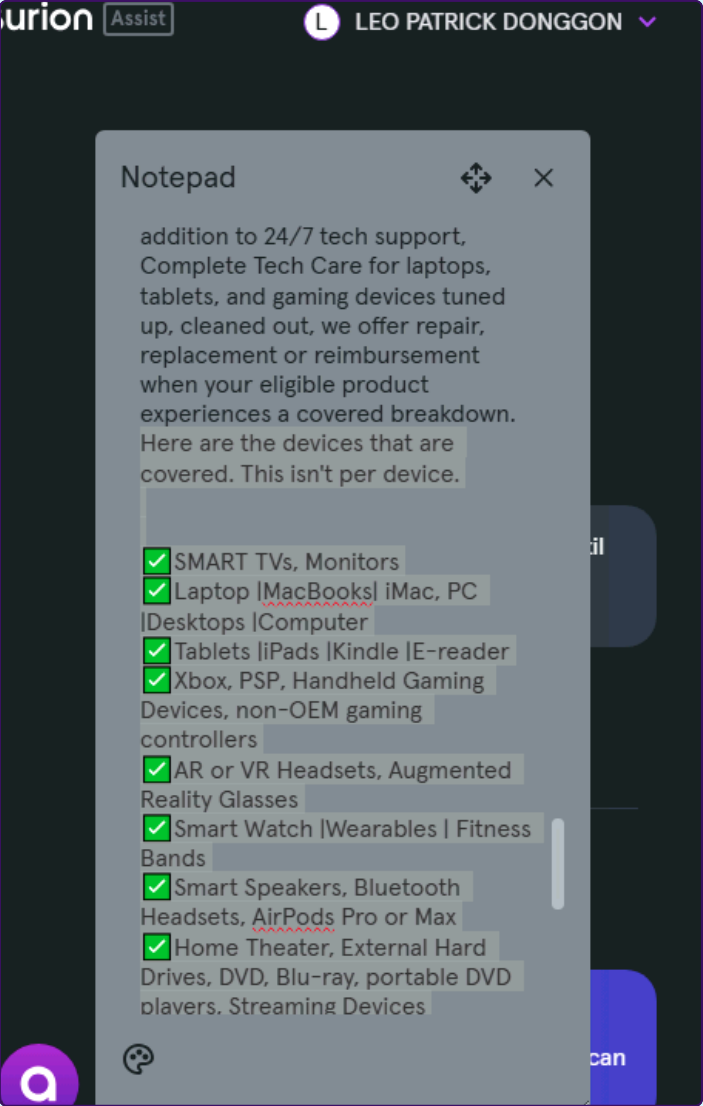
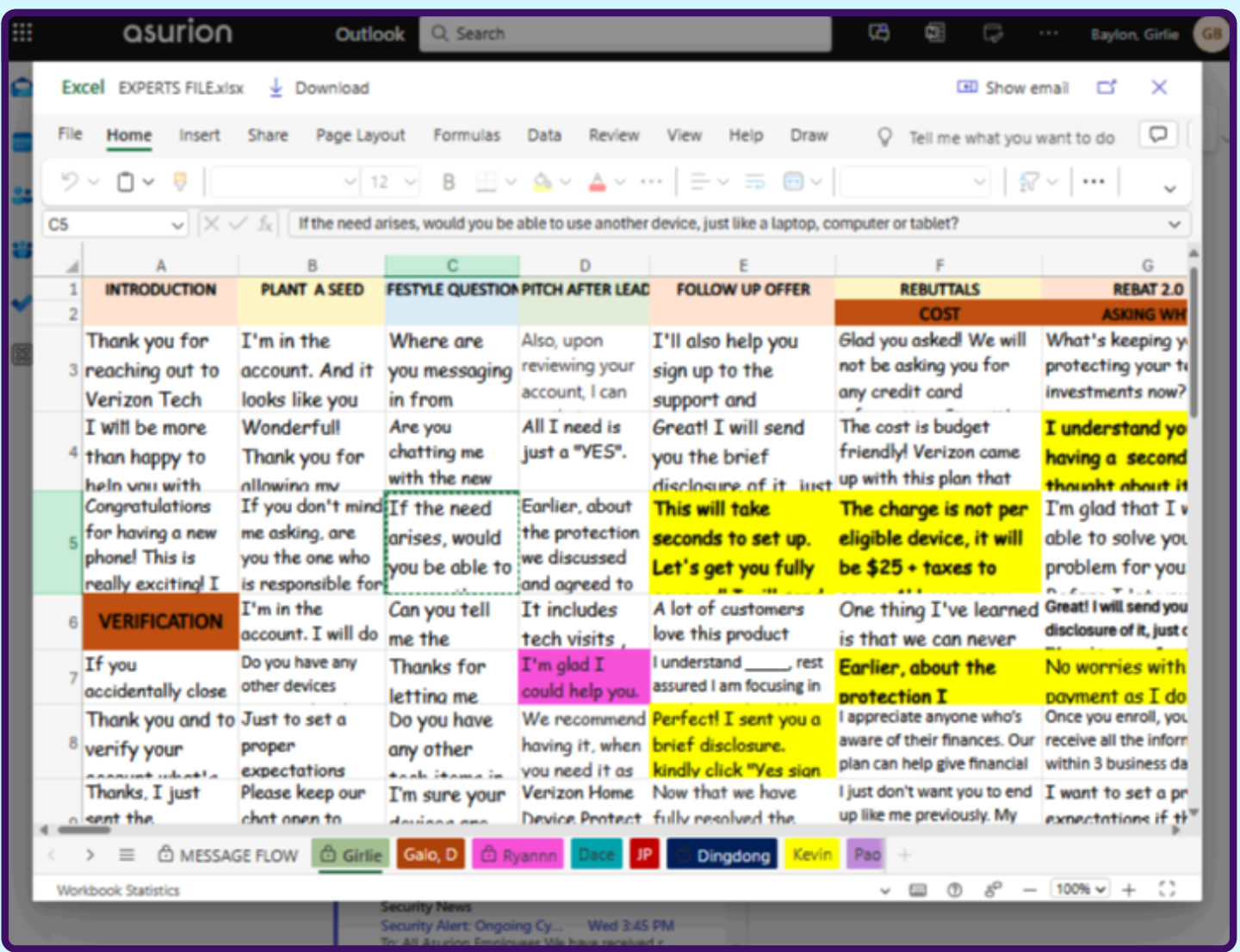
Poor grammar can reduce trust
and decrease likelihood of a sale

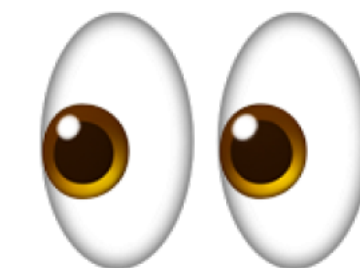
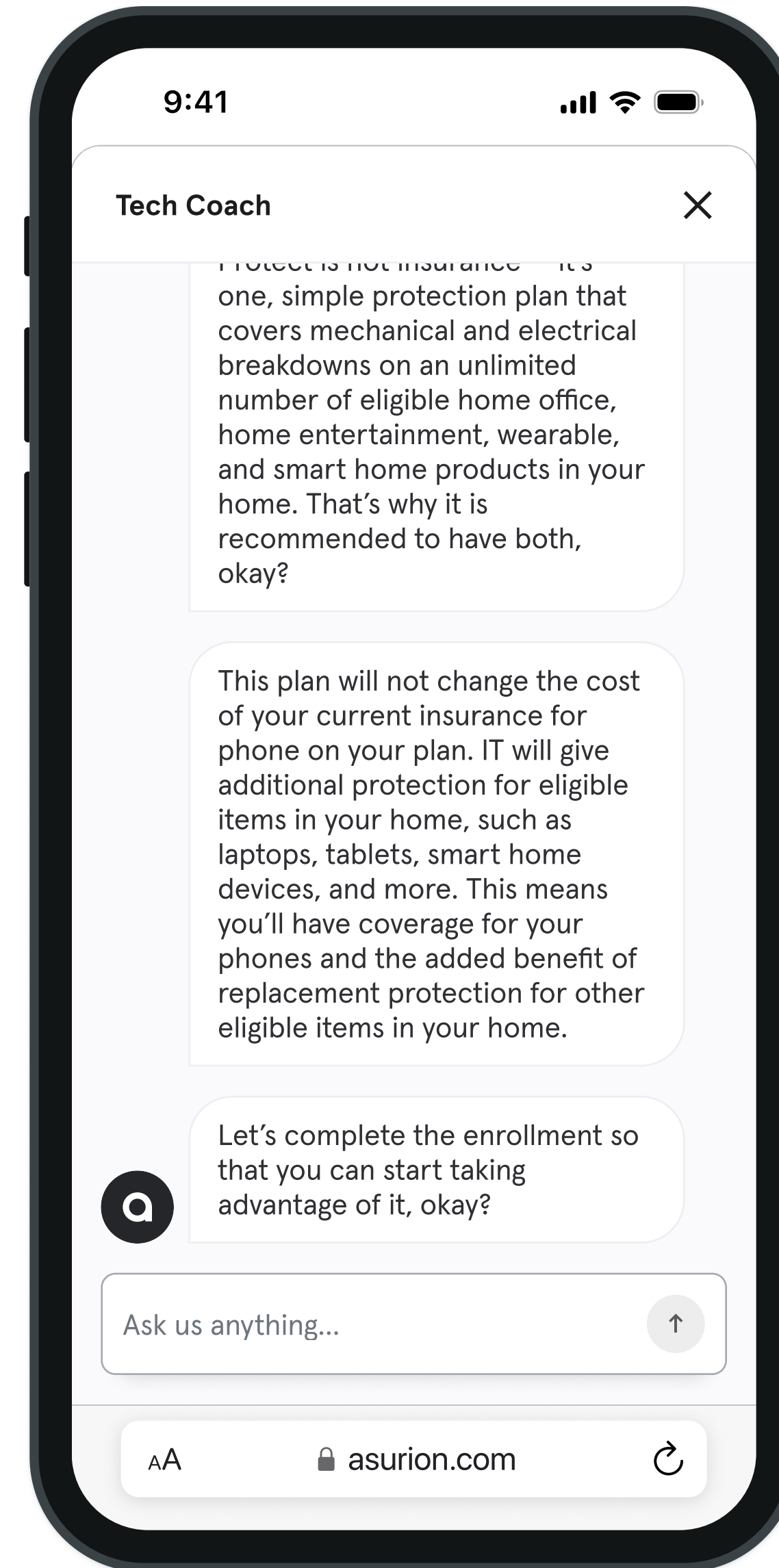
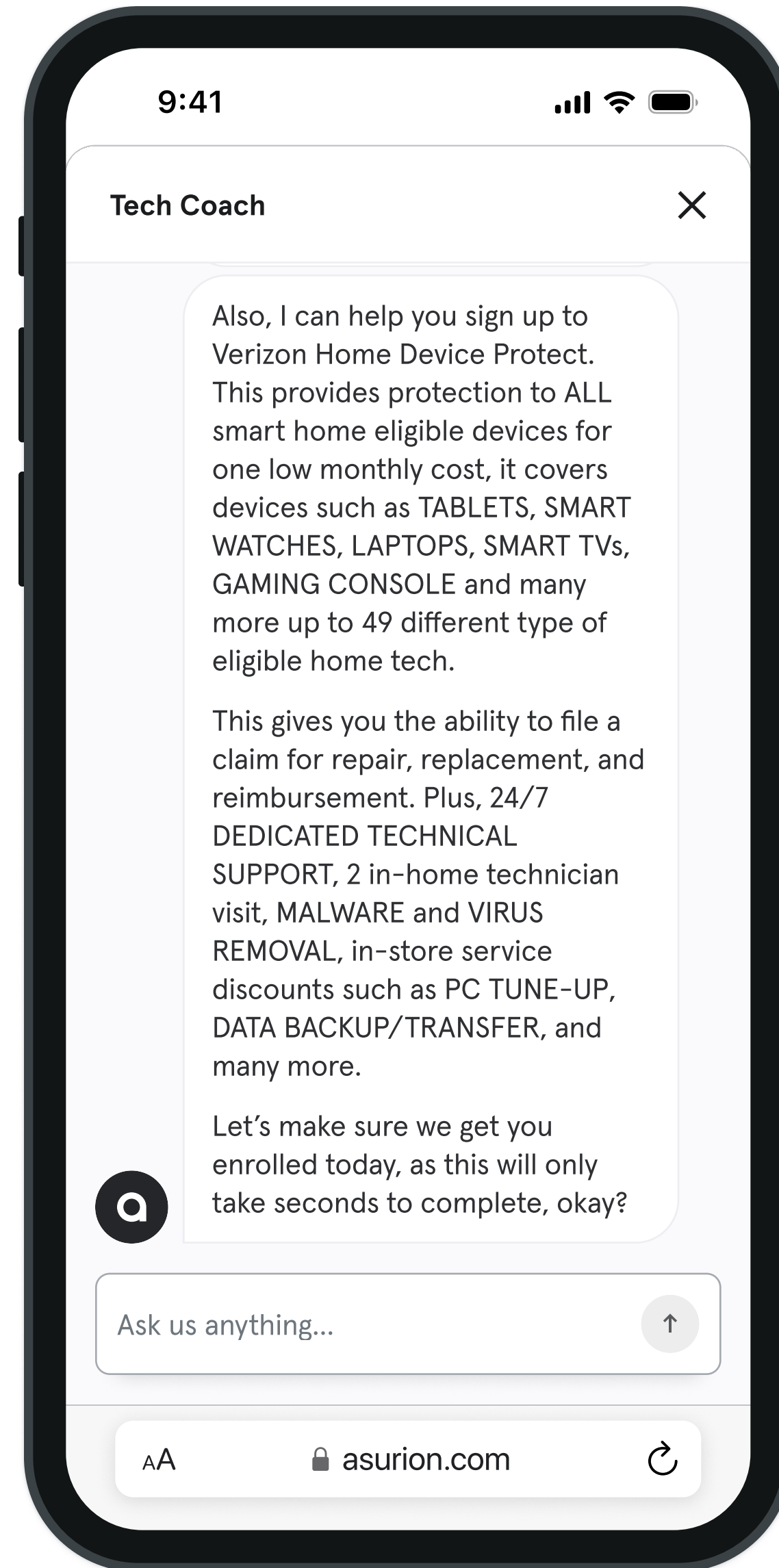
Awesome! Thank you for allowing my access, Greg.
😊 I'm in the account. And it looks 👁️👁️ like you have
Security and Protection that is still available and
hasn't been signed up on the account. Once we fix
your concern, I'll be more than happy to go over it
and get you all Sign up later, okay 🙌

Content is provided to the experts but tweaked to their preferences

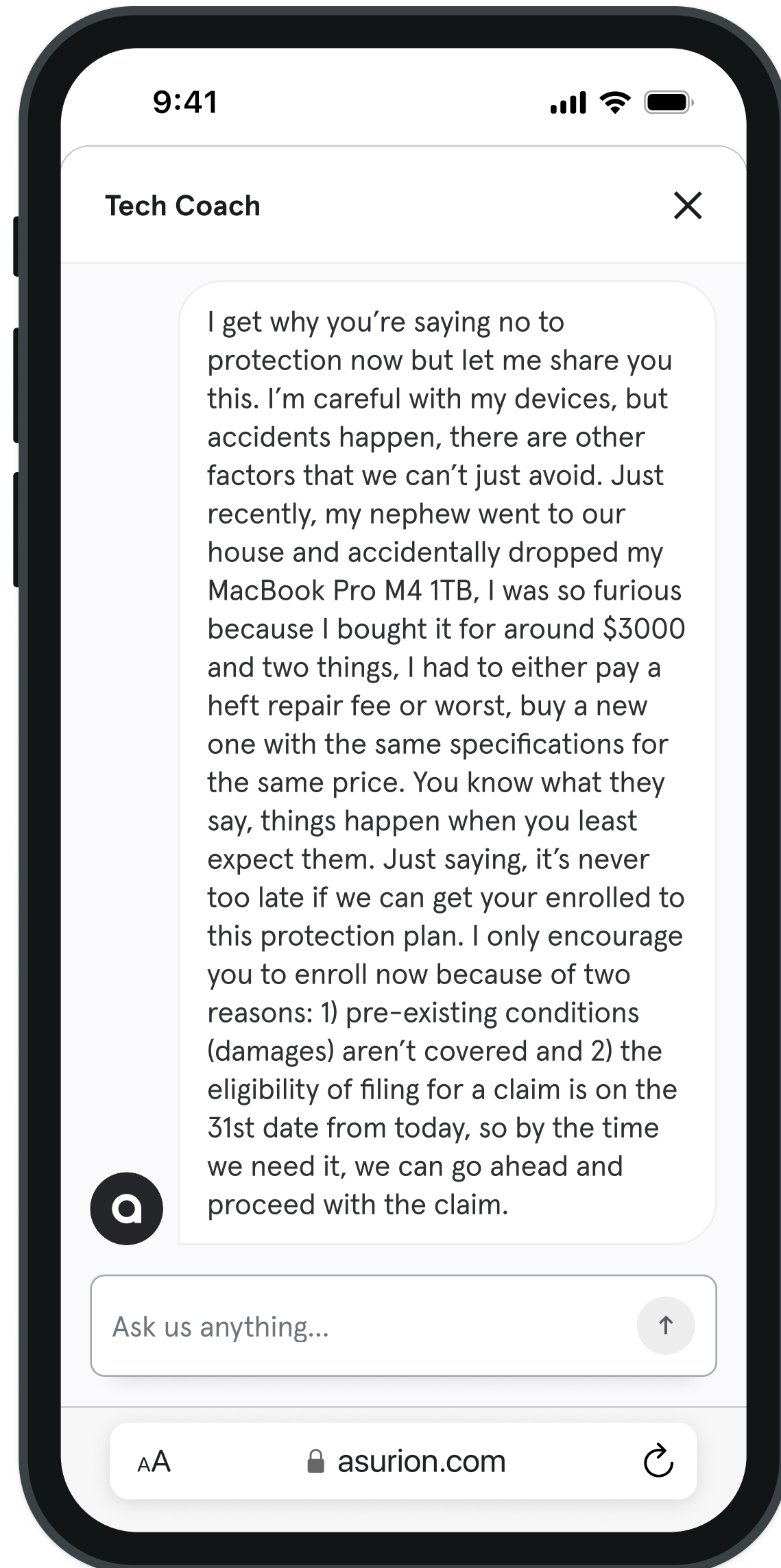
“Canned messages” are saved in a variety of tools:

1. Excel
2. Standalone Assist Notepad
3. Teams
4. Email drafts
5. OneNote





Sales pitch examples



Actual lines from the rebuttal 📌

“let me share you this”

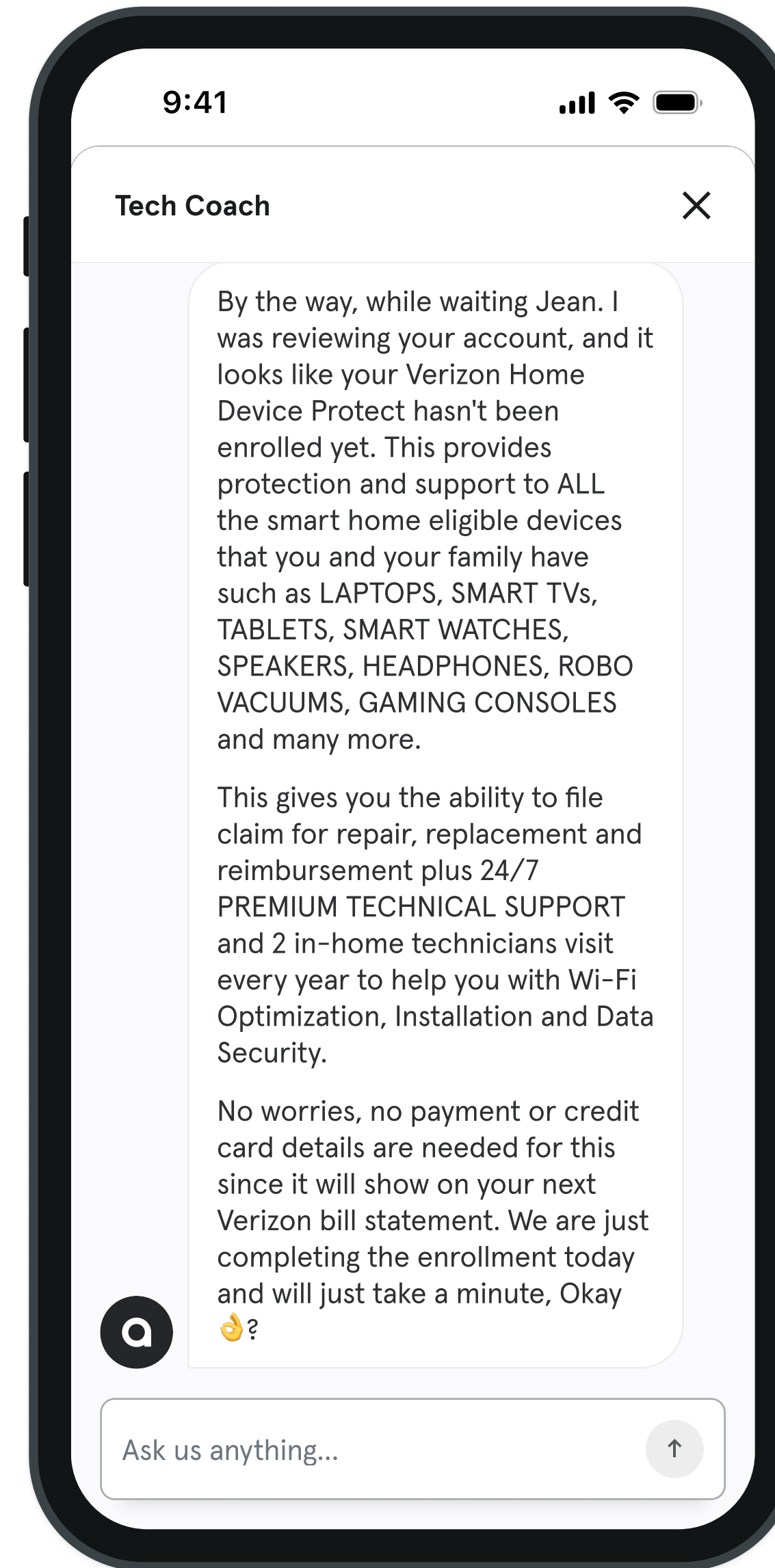
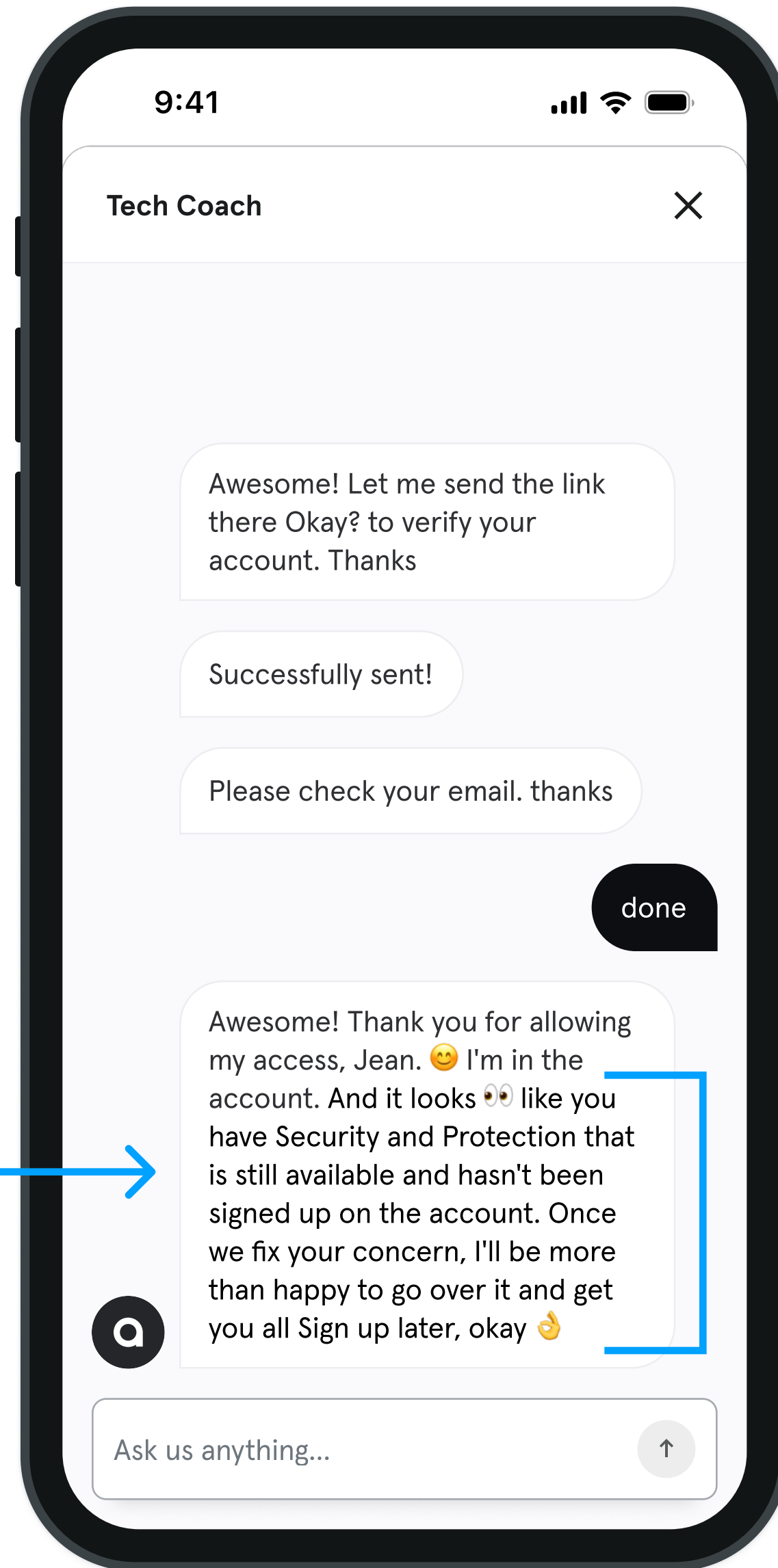
“there are other factors that we can’t just avoid”

“my nephew went to our house and accidentally dropped my MacBook Pro M4 1TB, I was so furious”

“I had to either pay a heft repair fee or worst”

“it’s never too late if we can get your enrolled”

“Planting the seed”



The pitch

What customers are saying

#1 Theme: Pushy sales early in the flow

(from 4-star Verizon messaging surveys ★★★★★)

Stop trying to sell other ‘perks’ or ‘plans.’ I asked for clarification on the new service trying to be sold to me, and I did not want it. Also, how it was phrased could have been confusing for someone thinking they already had the service. Someone could have mistakenly said something to confirm the service add-on. I had to reread the message several times before I understood what was happening. I would have been upset if I had been ‘tricked’ into adding that service to my plan. Other than that, I would recommend the chat as it provided clear help in resolving my issue.

Please stop asking me about the additional protection that I have declined nearly 5 times!

Not trying to push an insurance plan on me after I've already declined multiple times. I understand the tech may be required to per company policy, but no means no. Also that is nothing against the tech and totally against the company.

Very pushy on selling Verizon Home Protection plan after I repeatedly said no.

Tried to sell me stuff before my issue was even resolved. Failed at activating my phone the first time but thankfully succeeded the second time. Was polite, but after asking me to verify my phone was working ended chat on me without waiting for my reply.

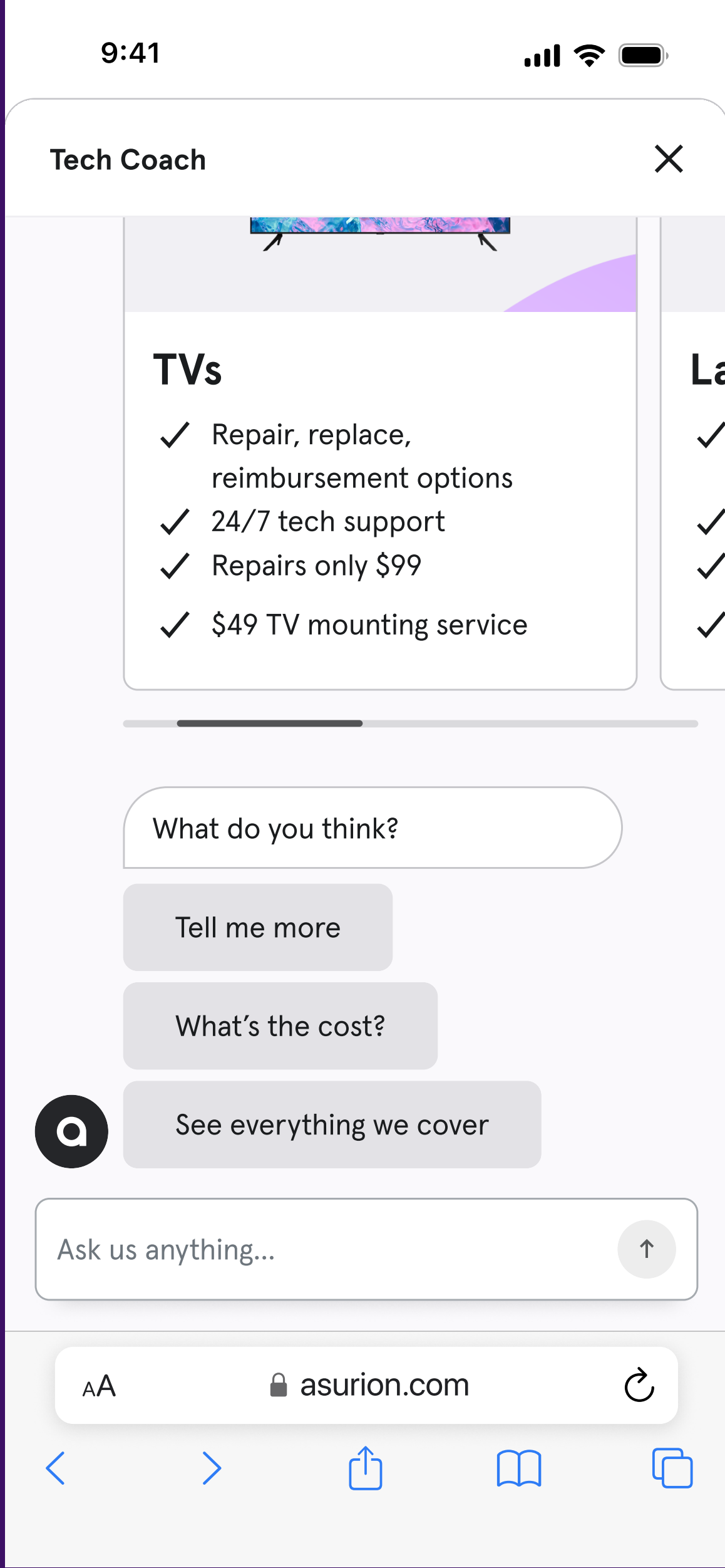
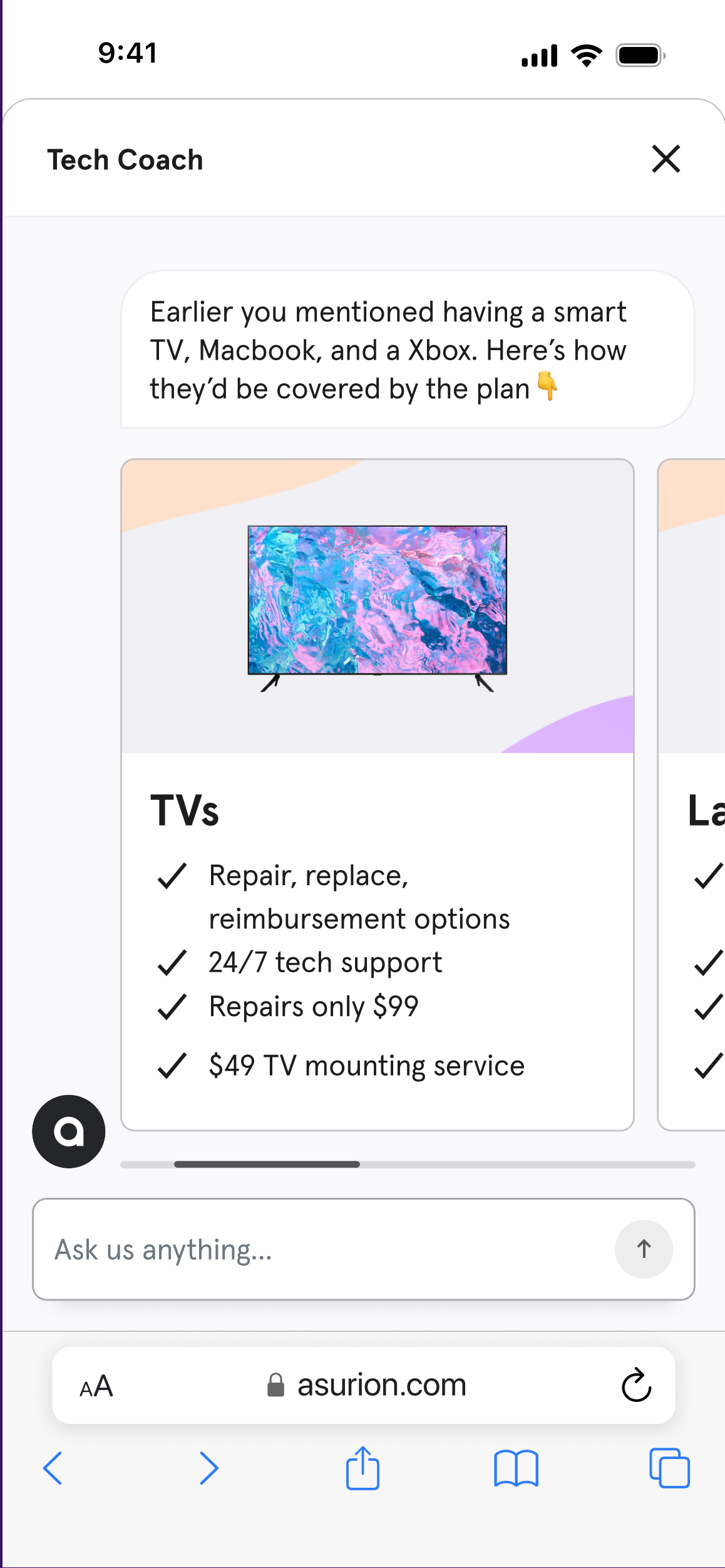
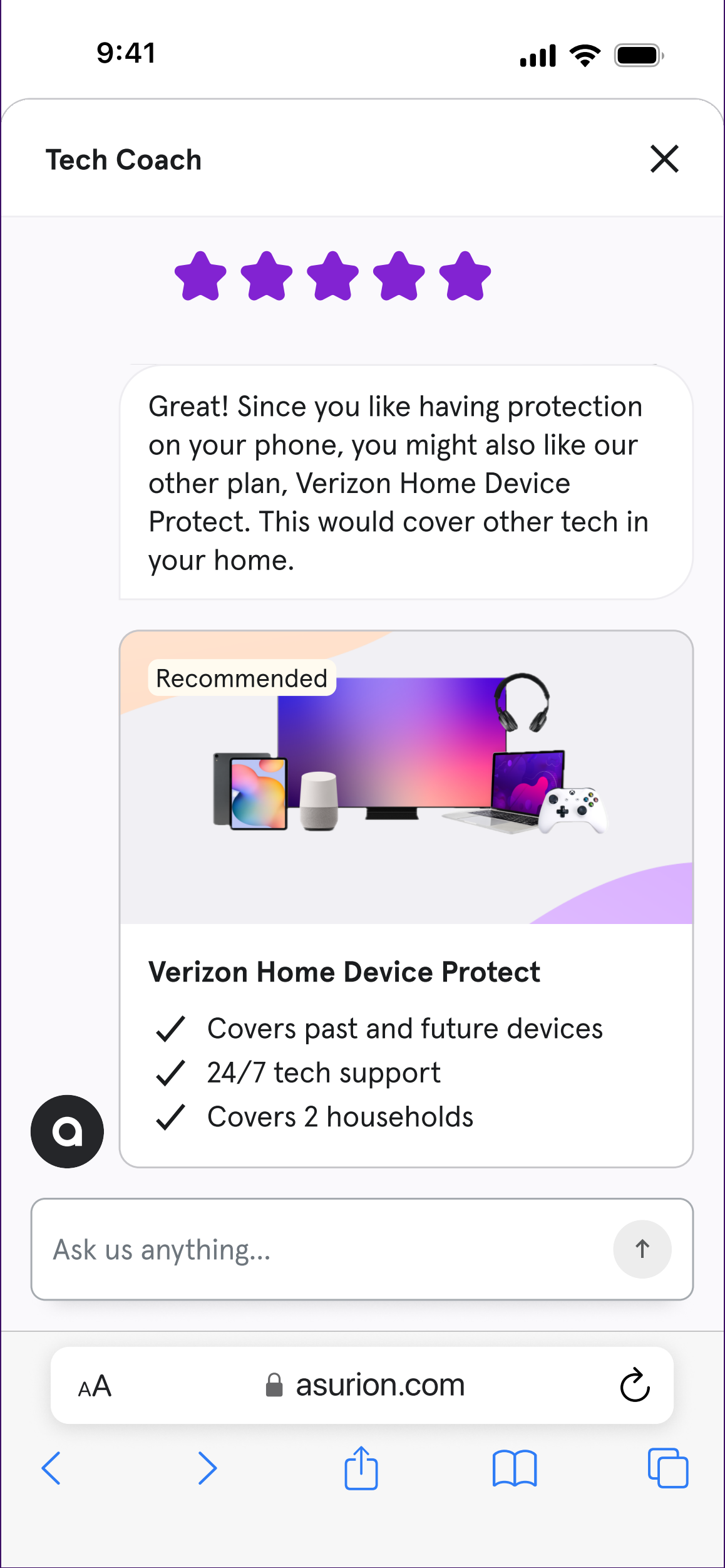
wording about a insurance plan got fuzzy and now im charged and cant get out of it

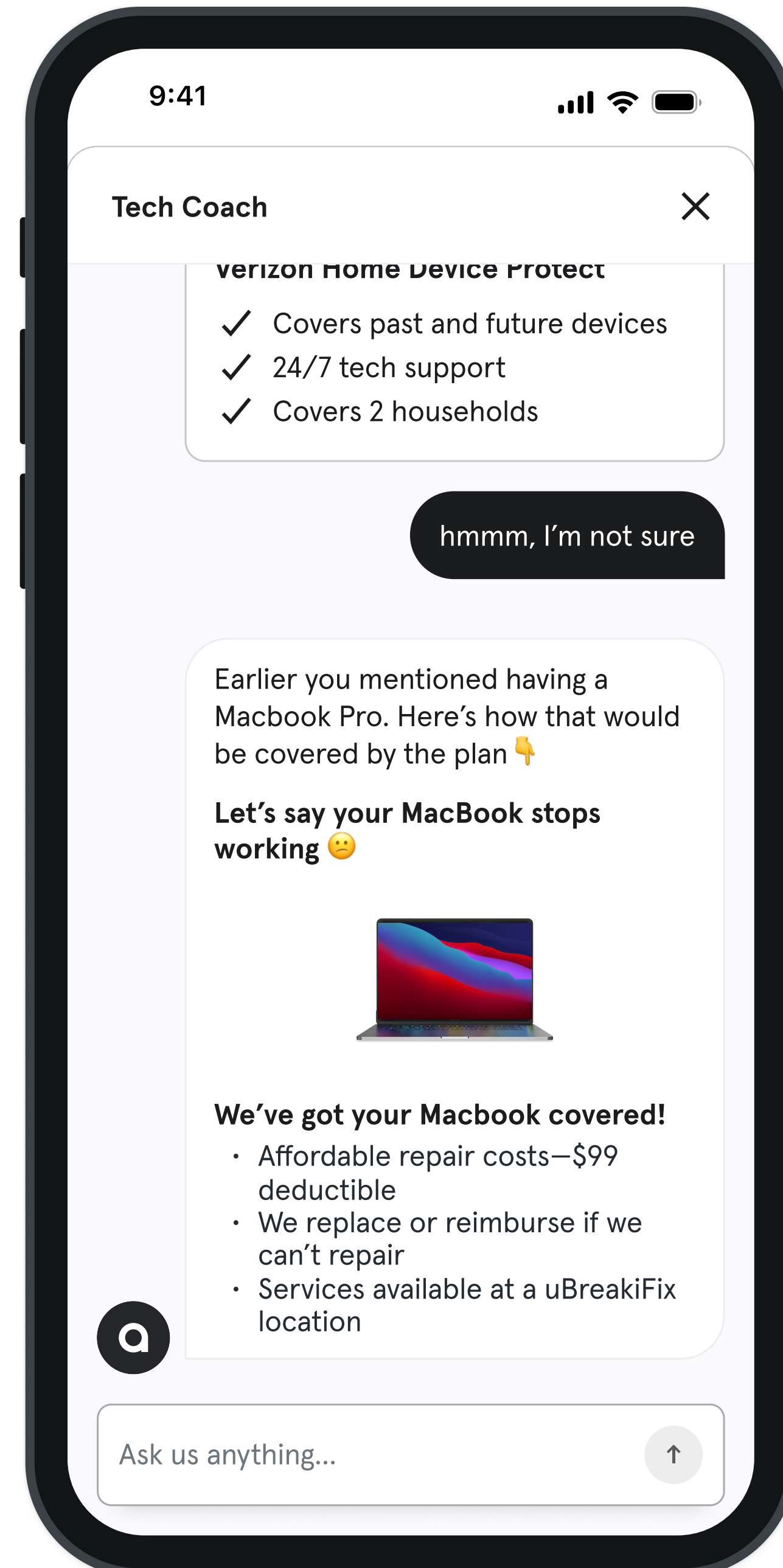
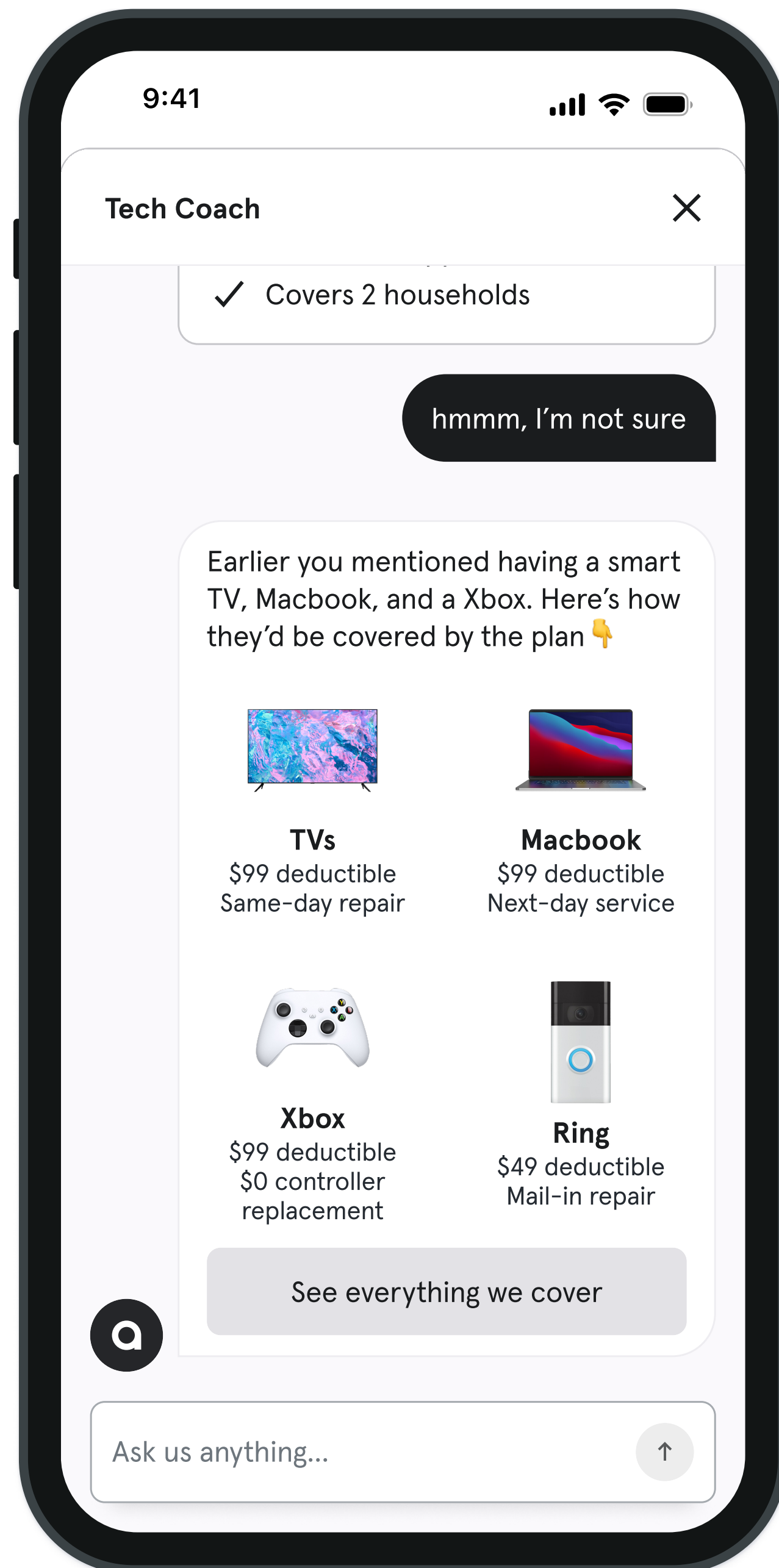
Conversation was great. Helped me resolved issue however I didn't not like right in the beginning of me addressing issue I was a bit bombarded about being up sold on a Verizon home protection plan and at the end I felt the person was really trying to push the product and didn't explain any price and was just trying to get me to say yes. After I said no , another sales pitch occurred . I didn't like that at all and strongly felt that to be a poor business tactic . If you are trying to push out a product just inform the customer and that's it . Leave it at that and don't us pressure tactics . I felt that to be a bad experience tonight .

too much aggressive advertising during the chat session, and the session took too long to identify the action and schedule a resolution. I'm also disappointed that a problem caused by an asurion tech couldn't be resolved by sending a tech to me. This with require at least 2 more hours of my time to take my phone to a tech

Solutions

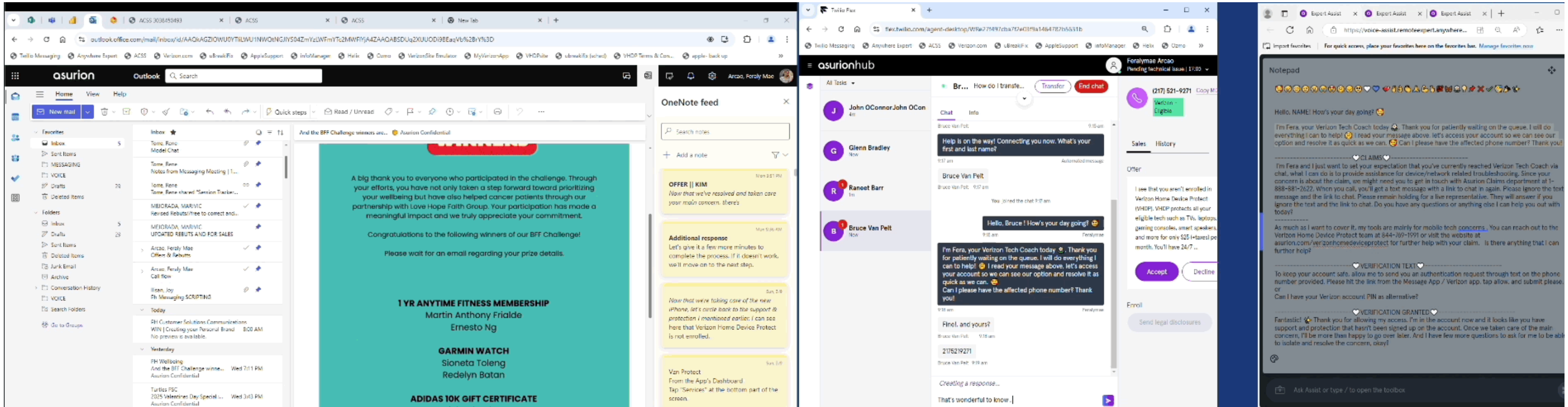
Sales







Efficiency



Experts deal with **authenticating up to 4 customers at once** in 4 different ACSS windows, leading to **longer wait time** for customers.

Authentication

Seconds to reply 📌

Thanks, **Redacted<NAME>**! This is **Redacted<NAME>**, 😊 your Verizon Tech Coach live representative. I appreciate your patience, and I'd be happy to assist you today. Before we start, can you please confirm the last **Redacted<NUMBER>** digits of the phone number we're working with? Thank you!	52
Redacted<NUMBER>	12
Great. For security, I'm sending you a link so I can access your account. Once you open the link, choose Allow, then Submit. Can you let me know once you get it?	18
How did you send a link? **Redacted<NUMBER>** seems locked halfway thru transfer	58
Oh, I apologize for the confusion! Do you happen to remember your Verizon PIN instead?	46
No. How do I find that	10
I have access to Verizon account under **Redacted<NUMBER>**.	
Redacted<NUMBER> I mean	
No worries, **Redacted<NAME>**! that didn't work but do you have access to your email associated on this account?	41
Yes	7
Awesome! Let me send the link there Okay? to verify your account. Thanks	25
Successfully sent!	
Please check your email. thanks	
Done	20

← Customer can't access the phone the
link was sent to

← Customer doesn't know PIN

← Expert asks about email as alternative

nearly 5 mins to verify

Customers often have to repeat themselves

Prompted to enter
name twice within 1 min



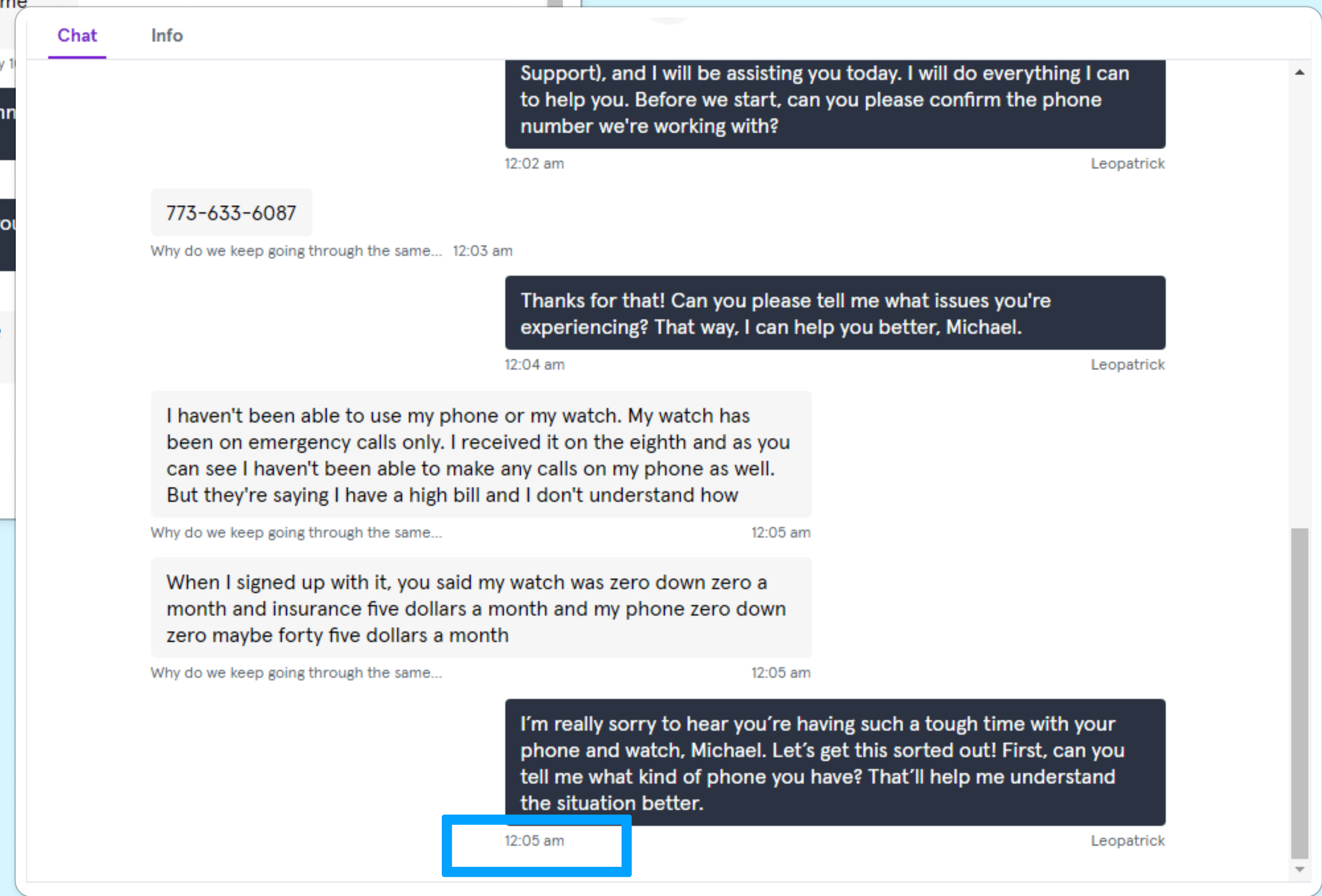
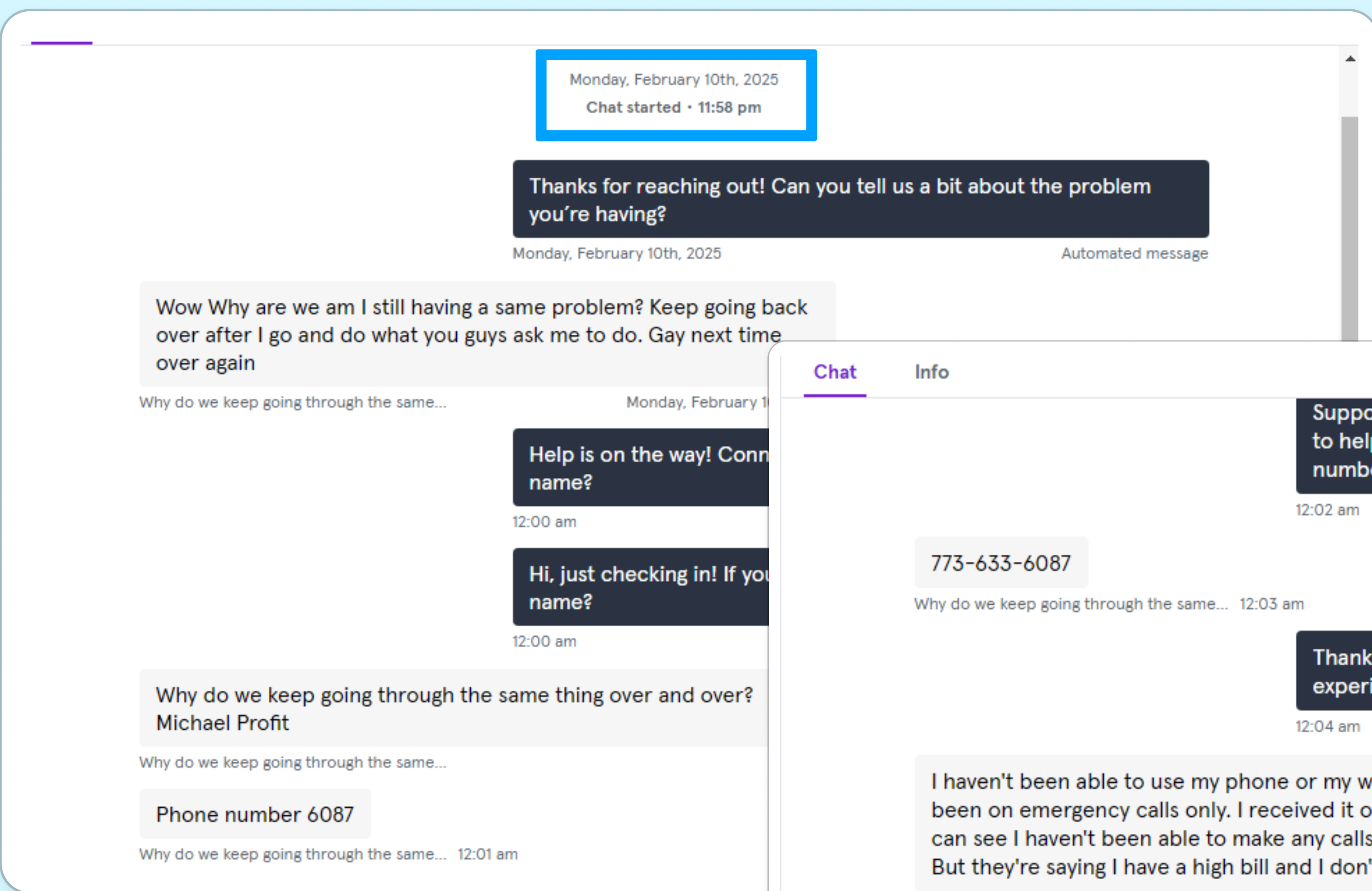
Thanks for reaching out! Can you tell us a bit about the problem you're having?
My laptop is not turning on

Help is on the way! Connecting you now. What's your first and last name?
Redacted<NAME>

Hi Shoua! Thank you for reaching out to AT&T ProTech Support! 😊 I'm here to help you today! In order to verify your account and keep your information secure, **Redacted<DATE_TIME>** I have your full name, phone number, and account PIN?

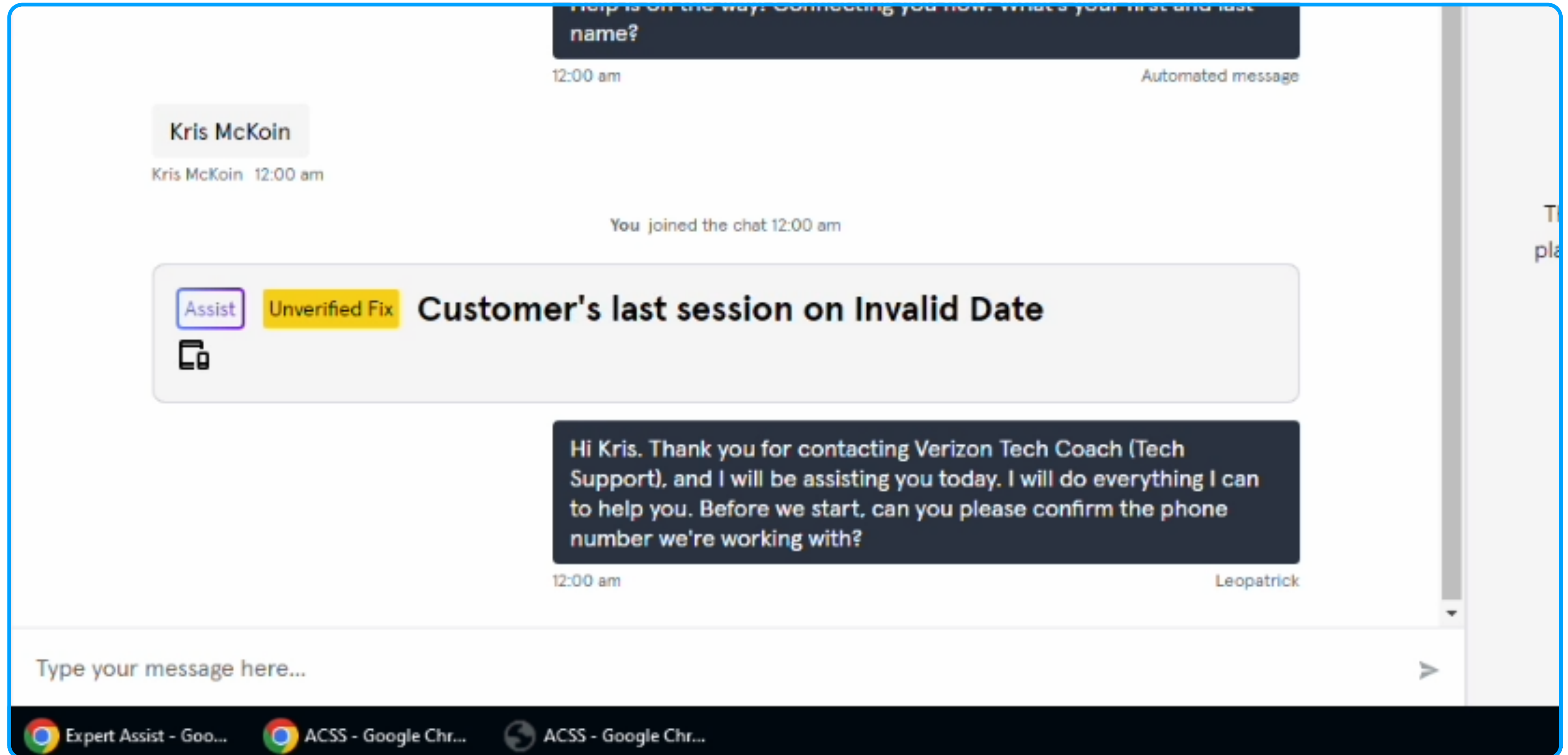
Redacted<NAME>,
Redacted<PHONE_NUMBER>,
Redacted<NATIONAL_ID>

Thanks for that, **Redacted<NAME>**! Now, let's dive into your laptop issue. - What brand and model is your laptop? - When you try to turn it on, do you see any lights



Phone model is asked
7 mins into convo

Lacking quality automated tools



Outdated data models

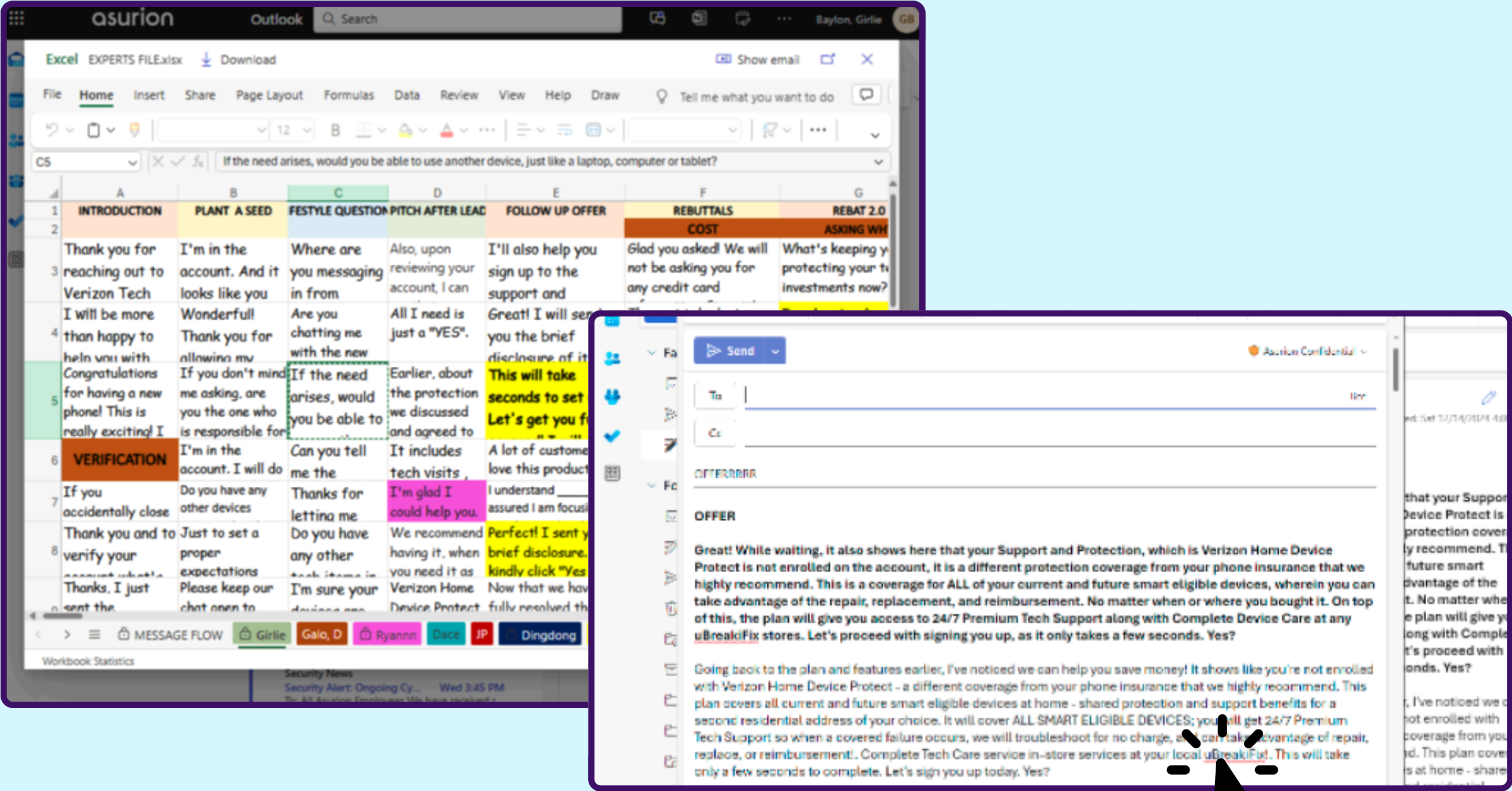
i have a problem with my iphone 16

11:59 am

I'm here to help, Cam! Just to clarify, I think you meant the iPhone 14 since the iPhone 16 isn't out yet. Can you tell me what specific problem you're experiencing with your iPhone?



The process of copy-pasting canned messages leads to errors



A customer received this message pasted twice as a single message

I'm [REDACTED] your Verizon Tech Coach today 🌸. Thank you for patiently waiting on the queue. I will do everything I can to help! 😊 I read your message above, let's access your account so we can see our option and resolve it as quick as we can. 😊 Can I please have the affected phone number? Thank you!

I'm [REDACTED] your Verizon Tech Coach today 🌸. Thank you for patiently waiting on the queue. I will do everything I can to help! 😊 I read your message above, let's access your account so we can see our option and resolve it as quick as we can. 😊 Can I please have the affected phone number? Thank you!

Paste

Widespread issues with grammar

Hi Tiffany, my name is Madison with At&t Protech,
how can I help you today?

I would like to make a claim for a lost device

Ah I see, I must apologize a claim can be filed on a
lost device via by the website with Asurion or by
calling 1-800-123-1234, as At&t Protech is setup for
technical troubleshooting and activations for
replacements however our insurer of Asurion has
access to the claims.

💡 How might we setup our
experts for success and avoid
these types of mistakes?

What customers are saying

It's blatantly obvious I was either speaking to AI or speaking to a person using copy-pasted answers. I don't appreciate it. I also don't appreciate how I was manipulated into chatting with y'all to cancel Mobile Protect when really it wasn't needed. I only keep y'all because I live and work in a rural area. I'd drop y'all in a heartbeat otherwise. Do better.

I got canned answers ... didn't listen to what I was trying to tell him. Took many iterations to get to an understanding, and then he said "Its Verizon's fault". Gee thanks.

When asked for a live agent, they should get you to a live agent stop the AI stuff doesn't work. All it does is upset customers

They were putting the effort in, but I'm still not 100% sure A[REDACTED] was a human. Aside from that, change your policy on items you can't repair.

The interaction seemed fake. Like I was talking to an AI chat bot.

I couldn't tell if I was communicating with a person or a computer. "She" kept directing me to do the same things over and over, and didn't appreciate the fact that I had NO access to either my new or old phone while in the middle of the set up process.

Solutions

**Increase efficiency &
content quality**

Bot collects more details and pass the context

asurionworkspace

Feedback

Busy

Madison Abrams

Kristina Humph...

1 min ago

Lindsay Fillmore

3 mins ago

Lindsay Fillmore - (555) 555-0100

Google Pixel

Device setup

21 : 12 min

Transfer

End chat

Lindsay Fillmore

(555) 555-0100

Mobile protection for 4 years

Chattanooga, Tennessee · 7:53 pm

Devices

Listening for tech and insights

Laptop

TV

Tablet

Game

Plans

Issue

Current plan

Pixel

Care+ by Asurion

24/7 support

Recommended

Google One AI Premium

Includes Gemini Advanced

You joined the chat at 8:29 AM

Ivy Sparks

2 min ago

I'm using the physical SIM card that came with the phone. I put it in, but it just shows 'No Service' at the top of the screen.

Me

1 min ago

Thanks for that information. Have you tried restarting the phone after inserting the SIM card? Sometimes a simple restart can help establish the connection properly.

Ivy Sparks

Just now

Yes, I've already tried restarting it twice. I even took the SIM out and put it back in. Still showing 'No Service' and I can't make any calls or use data.

Me

Just now

Got it, one moment, please

Send a message

Expert Assist

Customer needs help transferring content from iPhone to their new Google Pixel.

Google Pixel 9

Ok, let's get started. First, let's make sure you have the following:

Fully charged iPhone and Pixel

Charging cable

Quick Switch Adapter

Strong Wi-Fi connection

SIM card tool

Do you have everything listed above?

Let's ensure the physical SIM or eSIM has been properly activated in the system.

Help me solve

Ask Assist...

Grammar and style guide check

asurion workspace

Feedback

Busy

M Madison Abrams



Kristina Humphreys

1 min ago



Lindsay Fillmore

3 mins ago



Ivy Sparks

Just now

Ivy Sparks - (615) 480-1640

Microsoft

Help taking a screenshot

14 : 00 min

Transfer

End chat

Thank you for contacting Microsoft Xbox Support. I'm Sarah. I see you're having trouble with updating your Xbox. I'm happy to help.

✓

Ivy Sparks 2 min ago

hi, i need help taking a screenshot on my brand new phone

Me 1 min ago

Thank you for contacting Microsoft Xbox Support. I'm Sarah. I see you're having trouble with updating your Xbox. I'm happy to help.

✓

Ivy Sparks 2 min ago

hi, i need help taking a screenshot on my brand new phone

Me 1 min ago

Next we'll need your IMEI, you can find that under Settings > General > My Info.

✓

Let's take care of that next. They're are a few ways we cna handle that!

Grammar issues detected

Fix it

Send

Expert Assist

Send to customer

How often do updates occur?

Xbox typically releases major system updates every few months, with smaller updates in between. You can set your Xbox to automatically download and install updates during non-active hours by:

Going to Settings
Selecting "System"
Then "Updates & downloads"
Enabling "Keep my console up to date" and "Keep my games & apps up to date"

This way, most updates will happen while you're not using the system, often overnight.

Suggest a reply

Ask Assist...

Ivy Sparks

(615) 480-1640

Mobile protection for 4 years

Edit

Nashville, Tennessee

6:53 pm

Devices

Listening for devices

Laptop

TV

Tablet

Game con

+

Plans

Issue

Current plan

XBOX | Care+ by Asurion

24/7 Xbox Support

Key takeaway

The lack of tools to quickly send high quality messages creates an inefficient workflow and a degraded customer experience

Business goals impacted:

- Concurrency
- Resolution time
- SP100
- Customer experience

Research methods and references

- ✓ Observe sessions via Qfiniti
- ✓ Expert interview
- ✓ Expert survey
- ✓ Review transcripts
- ✓ ExWo Pilot learnings
- ✓ Competitive analysis
- ✓ Review customer surveys

Sources

[!\[\]\(4729e517bc6a7cd81c8025b9646574fb_img.jpg\) Expert interview notes](#)

[!\[\]\(cbe80b694ebd74fcfe136a095b608235_img.jpg\) Pilot feedback slack channel](#)

[!\[\]\(a03a7eb2f4046e1d3c76772003e549ea_img.jpg\) Expert survey results](#)

[!\[\]\(cbe2492b119e39e02a1dab2af4a4b296_img.jpg\) Customer surveys available here](#)

[!\[\]\(e474458956c9a37fbf9586ddb60a7fa1_img.jpg\) Transcripts PowerBI](#)