

Auto-Pilot Greetings

Sending a prompt and personalized greeting message is critical to making a great first impression with a newly assigned customer. However, at the moment of assignment, agents are often in the middle of other important tasks. Switching context to get caught up on the conversation can be disruptive to the agent's productivity.

With Auto-Pilot Greetings, agents can configure an adaptive greeting message with will auto-send upon issue assignment following a brief grace period. The greeting will adapt to make use of customer-specific data when it's available, including the customer's first name and their intent.

Agents have control of the feature-- they can turn it on/off globally, personalize the message, and intervene to cancel or send immediately.

The screenshot displays the ASAPP Agent Desk interface. On the left, there is a sidebar with a navigation menu including 'Help & Resources', 'Preferences', and 'Mateo Sanchez Available'. The main area is split into two columns. The left column shows two customer profiles: Penelope Williams-Smith (Intent: View Plan, Issue ID: 243534510001) and Grant Johnson (Intent: Change Plan, Issue ID: 243678910001). The right column shows a chat conversation for Penelope Williams-Smith. The chat history includes messages from SRS Support and Penelope Williams-Smith. At the bottom of the chat, there is an 'Autopilot Greeting' section with a 'Send now' button and a progress bar indicating the greeting is being sent in 00:10.

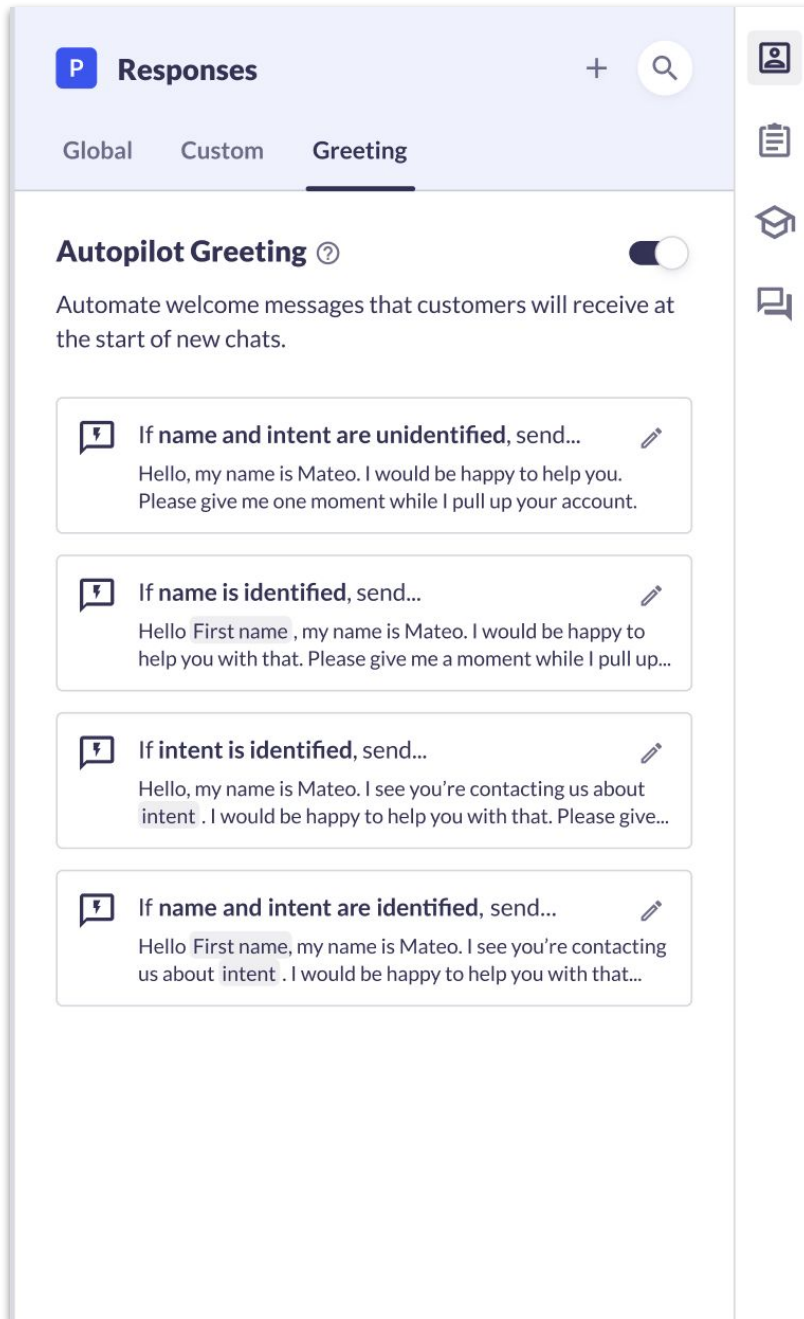
Customer Profile: Penelope Williams-Smith
 8432746464
 View Plan • 243534510001
 00:01
 Customer connected
 Autopilot greeting running
 Intent: View Plan
 Issue ID: 243534510001

Customer Profile: Grant Johnson
 00:04
 Great, thank you!
 Intent: Change Plan
 Issue ID: 243678910001
 Open slot

Chat History:
 SRS Support 11:05:19 AM: Device Activated!
 SRS Support 11:05:19 AM: Looks like you're eligible for 1 month of free data. Would you like to learn more about the offer?
 Penelope Williams-Smith 11:06:01 AM: Yes please
 Mateo Sanchez 11:06:50 AM: You're connected with Mateo

Autopilot Greeting:
 Cancel Send now
 Hello Penelope, my name is Mateo. I see you're contacting us about your plan. I would be happy to help you with that. Please give me a moment while I pull up your account.
 Sending in 00:10

Managing Auto-Pilot Greetings



P Responses + 🔍

Global Custom **Greeting**

Autopilot Greeting ?

Automate welcome messages that customers will receive at the start of new chats.

- If name and intent are unidentified, send...** ✎
Hello, my name is Mateo. I would be happy to help you. Please give me one moment while I pull up your account.
- If name is identified, send...** ✎
Hello **First name**, my name is Mateo. I would be happy to help you with that. Please give me a moment while I pull up...
- If intent is identified, send...** ✎
Hello, my name is Mateo. I see you're contacting us about **intent**. I would be happy to help you with that. Please give...
- If name and intent are identified, send...** ✎
Hello **First name**, my name is Mateo. I see you're contacting us about **intent**. I would be happy to help you with that...

Auto-Pilot Greeting messages are managed under the Greetings tab in the Responses drawer of the right rail of Agent Desk.

In order to globally turn the feature On or Off, the agent can adjust the toggle at the top of the Greeting tab

Four message variants are required as part of Auto-Pilot Greeting configuration, to account for all scenarios where more or less information about the customer is available.

By default, a preconfigured message is already set up for each of the four variants. To customize the wording, agents can hover over the pencil icon to edit each message variant individually.

Editing Auto-Pilot Greetings

There are two customer-specific data inserts that Auto-Pilot Greetings will try to make use of: a customer's first name and a description of their intent. The four greeting message variants cover all scenarios where more or less data is available.

Instructions- In the edit view, there are instructions that include an example, indicating how the data inserts should be used.

Checkmark Validation - For the three message variants that require data inserts, a checkmark will appear next to the listed data once it has been properly included in the message.

✕ Edit message

This message will be sent to customers if we don't know their name AND intent.

Edit message

Message text

Hello, my name is Mateo. I would be happy to help you. Please give me one moment while I pull up your account.

110 / 2500

Example greeting:

Hello, my name is Mateo. I would be happy to help you. Please give me one moment while I pull up your account.

The above is an example of variant 1, where neither the customer's name nor their intent is available.

✕ Edit message

This message will be sent to customers if we know their name only.

Edit message

Message text

Hello First name, my name is Mateo. I would be happy to help you with that. Please give me a moment while I pull up your account.

Message must contain the following data insert(s). 130 / 2500

✓ (firstName)

Example greeting:

Hello Susan, my name is Mateo. I would be happy to help you with that. Please give me a moment while I pull up your account.

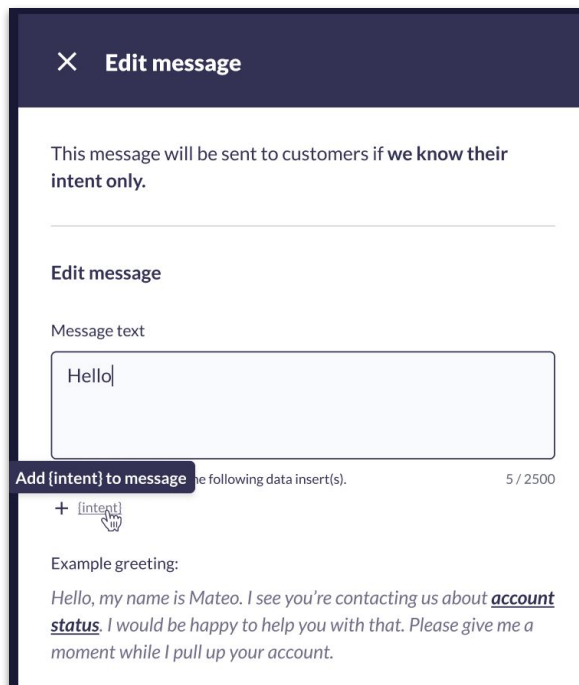
The above is an example of variant 2, where only the customer's name is available.

Editing Auto-Pilot Greetings (continued)

There are two customer-specific data inserts that Auto-Pilot Greetings will try to make use of: a customer's first name and a description of their intent. The four greeting message variants cover all scenarios where more or less data is available.

Quick-Add Data Insert Button - For the three message variants that require data inserts, there are quick-add buttons to make it easy for the agent to insert the required data insert while typing.

Error Validation on Saving - If the required data inserts have not been included, the agent will not be able to save the edited message and an indicator will appear next to all missing data inserts



Edit message

This message will be sent to customers if we know their intent only.

Edit message

Message text

Hello

Add [intent] to message the following data insert(s). 5 / 2500

+ [intent]

Example greeting:

Hello, my name is Mateo. I see you're contacting us about account status. I would be happy to help you with that. Please give me a moment while I pull up your account.

The above is an example of variant 3, where only the customer's intent is available.

" data-bbox="504 371 869 735"/>

Edit message

This message will be sent to customers if we know their name AND intent.

Edit message

Message text

Hello First name

Message must contain the following data insert(s). Type "!" to search or click the item(s) below to quick insert. 16 / 2500

- ✓ {firstName}
- ✗ {intent}

Example greeting:

Hello Susan, my name is Mateo. I see you're contacting us about account status. I would be happy to help you with that. Please give me a moment while I pull up your account.

The above is an example of variant 4, where both the customer's name and their intent is available.

Auto-Pilot Greetings Auto-Send

Once the Auto-Pilot Greetings configuration is set up and toggled ON, unless an agent intervenes, Agent Desk will auto-send a greeting on each new customer assignment after a grace period has elapsed. (*Note: this grace period is configured at the company level*).

Auto-Pilot Greeting will ONLY auto-send on first assignment. If the customer is being transferred from another agent OR if the customer was timed out and is chatting back in, Auto-Pilot Greeting will not send.

Agent Desk will always choose the message variant with the most possible data inserts-- if both data inserts are available, variant 4 will be used, if only one is available, variant 2 or 3 will be used, else, as a last resort, the generic variant 1 will be used.

The screenshot displays the Agent Desk interface. On the left, there are two chat cards. The top card is for Penelope Williams-Smith, with a timer of 00:01. It shows the customer is connected and an autopilot greeting is running. Below this, there are fields for Intent (View Plan) and Issue ID (243534510001). The bottom card is for Grant Johnson, with a timer of 00:04, showing the intent as Change Plan and Issue ID as 243678910001. At the bottom of the left panel, there are links for Help & Resources, Preferences, and a status for Mateo Sanchez (Available). The main chat area on the right shows a conversation with Penelope Williams-Smith. It starts with a system message 'Activating device...'. Then, SRS Support sends a message: 'Device Activated!'. Another SRS Support message follows: 'Looks like you're eligible for 1 month of free data. Would you like to learn more about the offer?'. Penelope Williams-Smith responds: 'Yes please'. Then, Mateo Sanchez sends a message: 'You're connected with Mateo'. At the bottom of the chat area, there is a preview of an auto-pilot greeting with a 'Send now' button and a 'Cancel' button. The preview text reads: 'Hello Penelope, my name is Mateo. I see you're contacting us about your plan. I would be happy to help you with that. Please give me a moment while I pull up your account.' Below the text is a progress bar indicating 'Sending in 00:10'.

As soon as a new assignment appears,, if Auto-Pilot Greeting is queued up to send to the customer, an indicator will show on the left hand panel chat card. The agent can click into the new chat to see a preview and timer-countdown of what will be sent, or they can continue on their current task.

Send Now or Cancel

An agent can intervene on the Auto-Pilot Greeting by either clicking 'Send now', which will override the timer and send the message right away, or by clicking 'Cancel', which will terminate the process for that chat.

Autopilot Greeting Cancel Send now

Hello Penelope, my name is Mateo. I see you're contacting us about your plan. I would be happy to help you with that. Please give me a moment while I pull up your account.

Sending in 00:10 