

# Automatic Summary

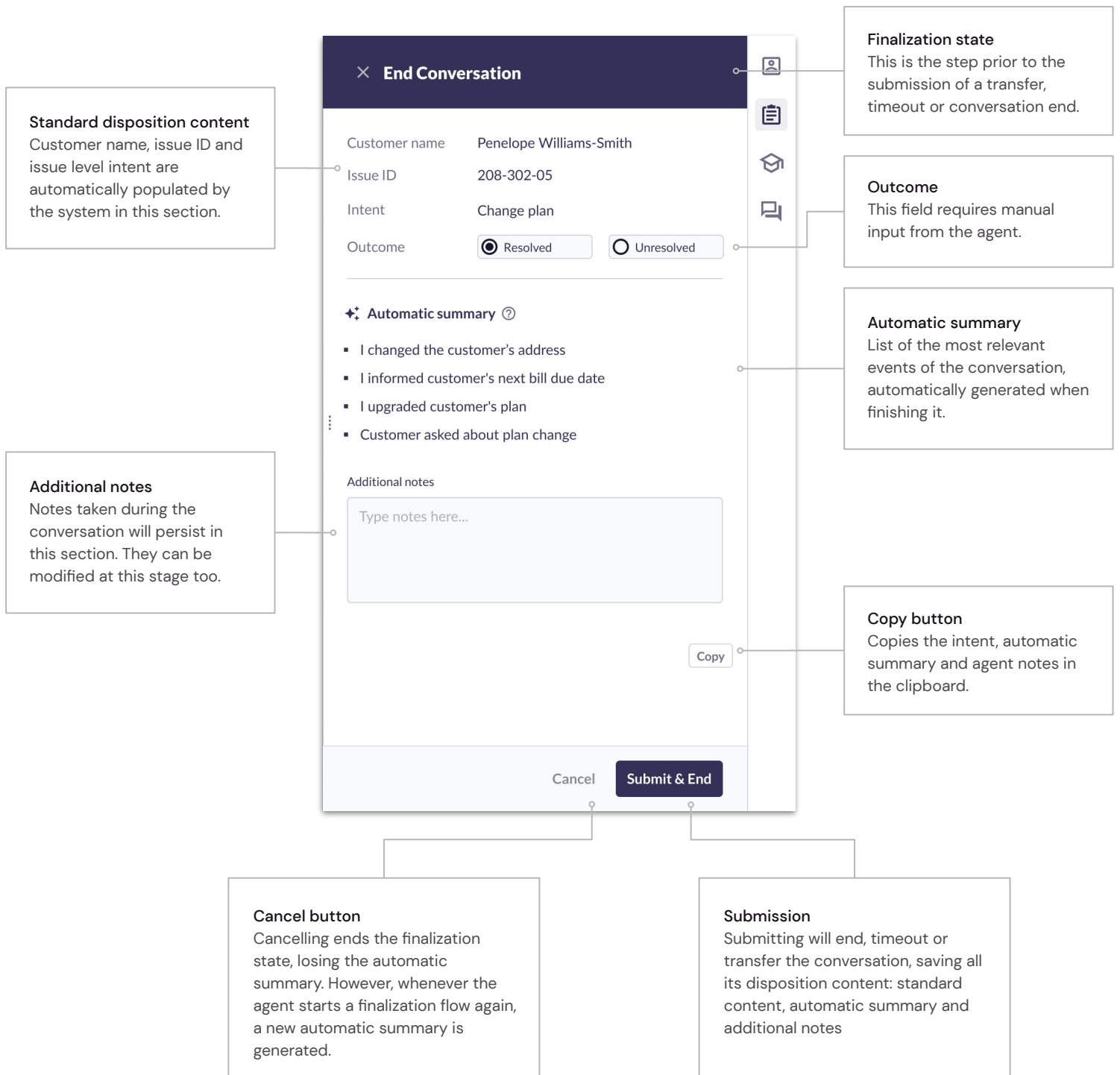
Automatic Summary is the first step towards the end-to-end automation of the entire disposition process. It consists of the automatic generation of summary tags that represent the most relevant events that took place during the conversation between the customer and the agent.

The automatic summary is generated when the agent is finishing the conversation, replacing manual disposition note-crafting and therefore reducing their after-conversation work.

The screenshot displays the ASAPP Agent Desk interface during a conversation. On the left, a sidebar shows the agent's status (Mateo Sanchez, Available) and a list of active conversations. The main area shows a conversation with Penelope Williams-Smith (Issue ID: 208-302-05). The conversation history includes messages from the customer and the agent, with the agent's last message being "No that's all thank you". Below the messages, there is a text input field for the agent to type a message to the customer, with a "Send" button. On the right, an "End Conversation" modal is open, displaying the customer's name, issue ID, and intent. It also shows an "Automatic summary" section with a list of generated tags: "I changed the customer's address", "I informed customer's next bill due date", "I upgraded customer's plan", and "Customer asked about plan change". There is also an "Additional notes" section with a text input field and a "Copy" button. At the bottom of the modal, there are "Cancel" and "Submit & End" buttons.

## Disposition modal deep dive

When finishing the conversation, the disposition modal in the right hand panel is automatically displayed, showing **standard disposition content**, the **automatic summary** and any **additional notes** the agent might have written throughout the conversation.



## Automatic Summary component deep dive

**End Conversation**

Customer name Penelope Williams-Smith

Issue ID 208-302-05

Intent Change plan

Outcome  Resolved  Unresolved

**1** ✨ **Automatic summary** **2** ⓘ

- I changed the customer's address
- I informed customer's next bill due date
- I upgraded customer's plan
- Customer asked about plan change

Additional notes

Type notes here...

Copy

Cancel **Submit & End**

### 1. Automatic Summary

List of up to 6 summary tags generated by our Fully Automated Summarization Technology (FAST) system.

These tags capture the key events of the conversation, specifically:

- Customer & agent actions
- Expressions of intent (can be more than one per conversation)

### 2. Help icon

By hovering this icon agents get a brief explanation of the automatic summary feature.

### 3. Tag removal

Agents can remove tags from the automatic summary by hovering them and clicking on the X button.

### Automatic Summary empty state

The amount of summary tags generated per summary depends on the confidence of our FAST system for a given conversation. This implies that for some of them –the minority– there will not be an automatic summary.

#### × End Conversation

Customer name Penelope Williams-Smith

Issue ID 208-302-05

Intent Change Plan

Outcome  Resolved  Unresolved

---

✦ Automatic summary ⓘ

Unable to generate accurate summary

Additional notes

Type notes here...

Copy

Cancel **Submit & End**

**Automatic Summary empty state**  
Agents will get this message when the FAST system retrieves zero summary tags

## Agent notes

Agents can write down notes and details during the conversation. These will persist at the moment of finalizing a conversation.

### 1. Ongoing conversation

#### Notes

Customer name Penelope Williams-Smith  
Issue ID 208-302-05  
Intent Change Plan

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Notes

Original plan: CT-L500

⋮ Copy

### 2. Finishing conversation

#### × End Conversation

Customer name Penelope Williams-Smith  
Issue ID 208-302-05  
Intent Change plan  
Outcome  Resolved  Unresolved

---

✦ Automatic summary ⓘ

- I changed the customer's address
- I informed customer's next bill due date
- I upgraded customer's plan
- Customer asked about plan change

Additional notes

Original plan: CT-L500

⋮ Copy

Cancel Submit & End

Notes taken during the conversation in the **Notes** section will appear in the **Additional notes** section when finishing the conversation.

## Customer history cards

Disposition content can be found by agents in the customer history cards. This information helps them to take at-a-glance overview of the customer and ramp up on the conversation faster, specially on transfers and call-backs.

**Penelope Williams-Smith**

Profile History

Jump to date

February 2021

Feb 01 • 3:34PM

**Change Plan • 00:35:32**

Issue ID 208-302-05

Outcome ✓ Resolved

Susan Tran • 1920001

✦ Automatic Summary

- I changed the customer's address
- I informed customer's next bill due date
- I upgraded customer's plan
- Customer asked about plan change

Agent notes

Lorem ipsum dolor sit amet, consectetur adipiscing elit ullam sed urna vitae ligula condimentum tincidunt eu at elit. Etiam nec posuere orci.

View transcript

**Issue-level content**  
Top section of the customer history card. It includes:

- Intent
- Issue duration
- (icon) Customer's channel
- (icon) Type of assistant
- Issue ID
- Outcome

**Assignment-level content**  
Bottom section of the customer history card.

An issue can have multiple assignments depending on whether there were transfers and/or timeouts.

This section includes, for each assignment of the issue:

- Agent name
- Agent ID
- Automatic summary
- Agent note

## Customer History Card

Customer history cards can be found in the Customer Profile section in the right hand panel.

### Automatic Summary configuration

Automatic Summary feature can be turned ON or OFF. When turned OFF, there are two possible configurations: (A) opt-in conversation summary tags or (B) no directed automation at all.

#### Alternatives to Automatic Summary

× End Conversation

Customer name Penelope Williams-Smith  
Issue ID 208-302-05  
Intent Change Plan  
Outcome  Resolved  Unresolved

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Notes

- I changed the customer's address

⋮

I changed the customer's address Copy notes

Customer disputed the billing fee +

I refunded the billing fee +

× End Conversation

Customer name Penelope Williams-Smith  
Issue ID 208-302-05  
Intent Change Plan  
Outcome  Resolved  Unresolved

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Notes

- I changed the customer's address

⋮

Copy notes

#### A. Opt-in conversation summary tags

Agents get up to 6 suggestions of conversation summary tags during the conversation and at the end of it. They have to select a tag in order to include it in the disposition note.

#### B. No directed automation

There is no automation to help agents craft disposition notes.