

2026 EDITION

Five AI customer support workflows that **earn their keep.**

Booking, support, lead capture, reminders, and internal ops — the exact use cases, setup, costs, and failure modes that separate useful assistants from unhelpful automation.

THE DISTRIBUTION EDGE

Your customers are already there.

The best channel is the one your customers already use. For some businesses that is customer messaging. For others it is website chat, email, Instagram DMs, a CRM inbox, or a help desk. The offer is not the channel — it is the trained assistant behind it.

1 inbox

Start where your highest-volume repeat questions already arrive

< 3 min

Fast response expectation on chat and messaging channels

0 new habits

Use the existing customer path instead of forcing a new tool

When it works

Local services, appointment-driven businesses, customer support for repeat customers, and any team already losing hours to the same inbound questions.

When it doesn't

Long-form sales, cold outreach, legal or medical advice without review, and anything where a wrong answer creates real risk.

BOOKING, SUPPORT, LEAD CAPTURE

The three patterns that cover 80% of small business.

- **1. Booking assistant.** Customer opens chat → selects service → assistant proposes 3 available times → confirms → syncs to Google Calendar → sends reminders 24h and 2h before. Deflects 90% of "can I book?" messages.
- **2. Support triage assistant.** FAQ answers via AI on your actual documentation. Escalates to human for anything it can't confidently answer. Logs the whole thread so the human starts mid-conversation, not from scratch.
- **3. Lead capture from inbound.** Landing page sends visitors into chat instead of a cold form. Assistant greets, qualifies with 2–3 questions, routes qualified leads to sales with full context.

RULE

Every assistant has a clear "talk to a human" escape. If the user types "human", "help", or anything emotional, it pauses the flow and pings a person. Assistants that trap users in loops destroy the brand.

REMINDERS, OPERATIONAL

The quieter wins.

- **4. Proactive reminders + re-engagement.** Past customers get a message at the right interval (e.g. "it's been 6 weeks — book your next session?"). Opt-in only. Often drives 15–30% of monthly bookings for appointment businesses.
- **5. Internal ops assistant (staff-facing).** Staff messages the assistant for shift swaps, sick-day reporting, inventory alerts, order status. Replaces 3 customer messaging groups + 2 spreadsheets with a single structured channel. Dramatically underrated.

What's under the hood

Channel adapter

Customer messaging channel, website chat, email, CRM, or help desk. The adapter changes by business; the assistant logic, knowledge base, and review loop are the durable parts.

Model workflow

A model reads intent, retrieves the right context, drafts the reply, and hands off when confidence is low. Provider choice is practical: OpenAI, Anthropic, Gemini, or whatever fits the job.

WHAT GOES WRONG

The three things that kill assistant engagements.

1. The assistant never learns

Without a review queue where humans correct bad responses, the assistant stays at day-one quality forever. The value is not the assistant — it's the loop between assistant, human, and improving prompts.

3. Overautomation

Trying to replace humans entirely. The best assistants handle volume and routine; humans handle emotion and complexity. Teams that try to fully automate see 20%+ churn from frustrated customers within two months.

2. Channel violations

Cold outreach, unsolicited broadcasts, scraping inboxes, or bypassing platform rules. A useful assistant respects the channel it runs inside.

What to measure

Deflection rate (% of conversations resolved without human). CSAT on assistant-handled threads. Escape-to-human rate. Cost per resolved conversation. If any of these is trending wrong, pause automation and re-train.

Thirty days. One use case.

Don't try to automate everything at once. Pick the single highest-volume conversation type in your business and automate that, well. Expand only after it's rock-solid.

- Pick the #1 conversation type** you have weekly. Measure the hours spent today.
- Write out the ideal script** — what a perfect human would say. The assistant learns this, not invents.
- Ship a beta to a friendly cohort** (10–20 customers who know it's new).
- Review every conversation for the first week.** Correct the assistant daily. Quality at the start compounds.
- Expand only when CSAT \geq 4.5/5** and deflection rate is hitting target.

NEED AI CUSTOMER SUPPORT THAT ACTUALLY WORKS?

I build trained assistants for the inbox your customers already use, tuned around the questions they actually ask and integrated with the tools your team already uses.

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