



# AI's Second Cousin - RPA and the Road to AI

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# About Freshworks



**2010**

Founded



**\$36.4M**

FY21 Annual Guidance



**+46%**

YoY Q3 Revenue Growth



**4300**

Employees



**TR** TrustRadius



**Gartner**

**Recognition**

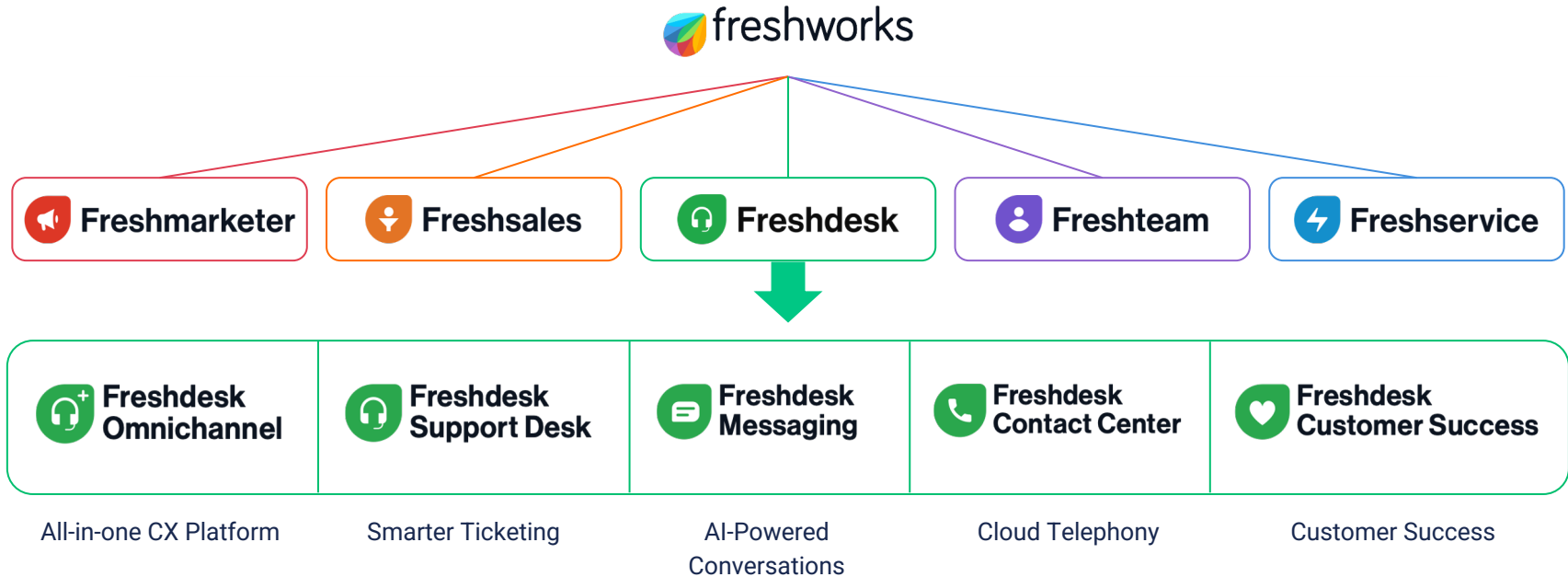
Leader in 3 Major Peer Reviews  
Recognized in 4 Gartner Magic Quadrants



**52,500**

Total Customers

# Our Product Portfolio



# Agenda



1) RPA vs. AI

1) Use Case

1) Results

1) Learnings







# AI versus RPA

## Robotic Process Automation (RPA)



Human agency triggers an  
automated process



## Artificial Intelligence (AI)



An intelligent machine triggers an  
automated process - human-free!

# The Problem



**Company:**  
**D2C Subscription Box Service**



Customers are charged weekly for their next order and sometimes forget to put their orders on pause if they're going out of town or just want a break.

A large volume of customer contacts comes into the email and chat queues every afternoon when customers are charged en masse, asking to cancel their order and causing a large backlog.

Goal - answer these customers ASAP to assure them they're taken care of and ensure that customers with more time-sensitive issues are not left waiting for assistance.

# The Solution



We partnered with a company to build a bot that enabled agents to cancel a customer's order and complete all subsidiary tasks in two clicks.

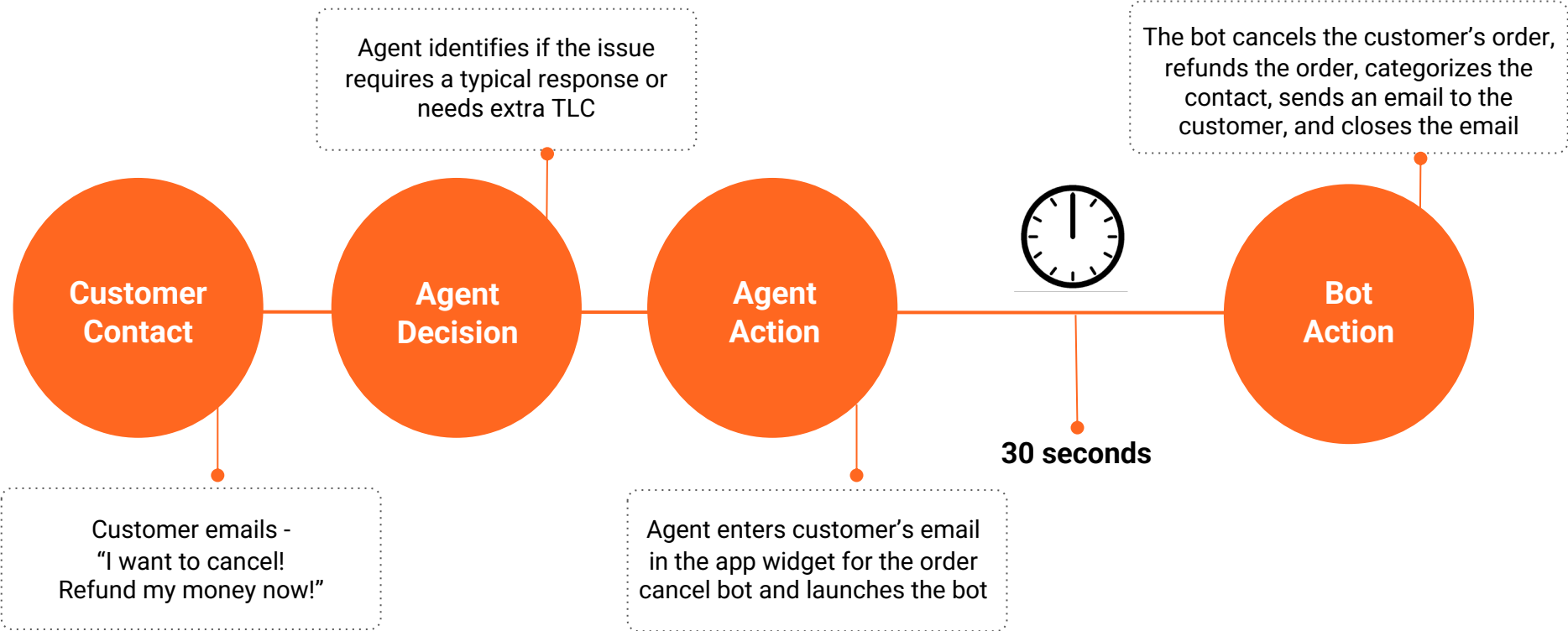
The bot was activated for both email and chat contact channels and existed as an app in the sidebar of our customer support platform.

The bot allowed agents to customize behavior within certain boundaries (example - agents could decide if they or the bot sent the customer a reply to confirm cancellation).

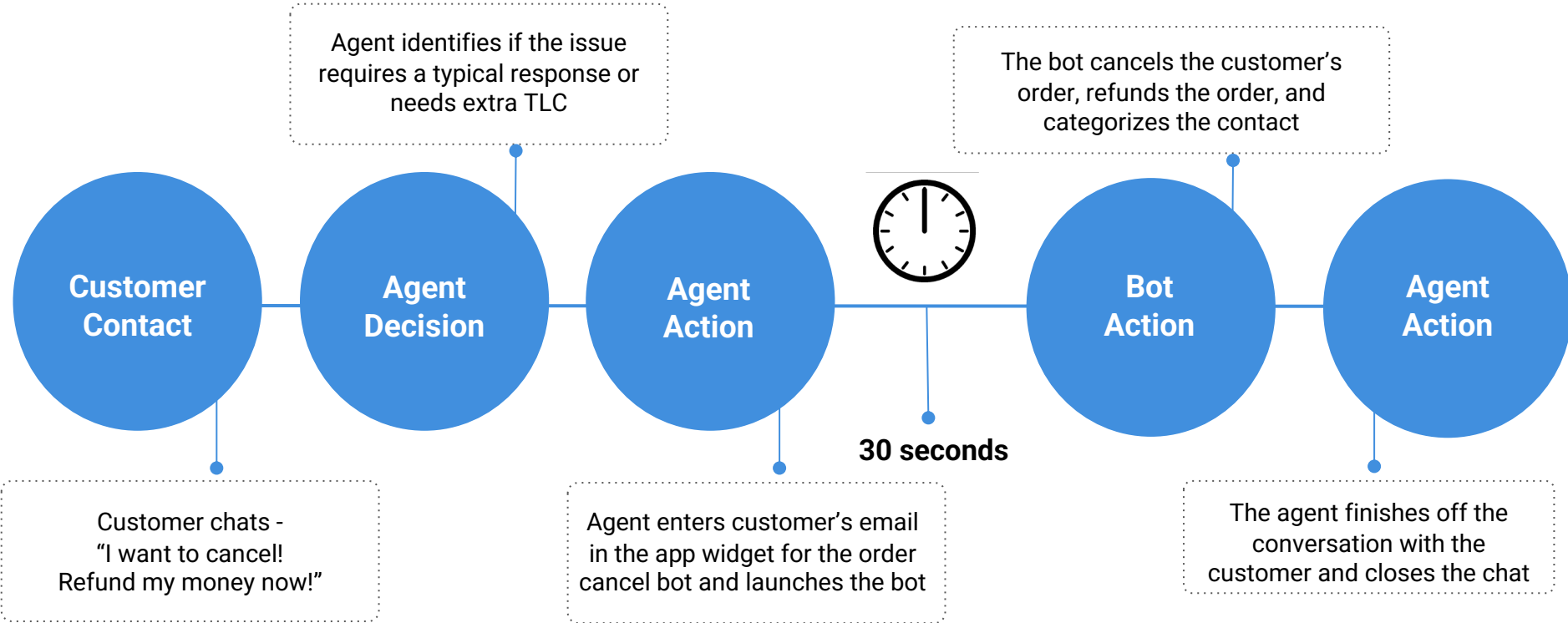




# The Steps - **Email** Version



# The Steps - Chat Version





All tickets > 5731407

New ▾

Search



A



Reply

Add note

Forward

Close

Merge

Delete

Robo assist



Show activities



## Freshconnect Activation Request

Hoang Lo reported via email

1 update



Hoang Lo reported via email, 15 minutes ago (Thu, 27 Feb 2020 at 9:28 AM)  
to: support@freshconnect.io

Hey Dhivya,

You have a new collaboration request

Email: hoang@boost.link

Freshdesk Domain URL: boostlink.freshdesk.com

Freshsales Domain URL: .freshsales.io

Add summary

Reply

Add note

Forward



## Robo assist processes

Search processes

All processes (30)

### Request quotation

This automation allows you to cancel open order in system using Order ID

### Order cancellation

This automation allows you to cancel open order in system using Order ID

### Order cancellation & refund

This automation allows you to cancel open order in system using Order ID

### Order modification

This automation allows you to modify the order

### Order modification



All tickets > 5731407

New

Search



Reply

Add note

Forward

Close

Merge

Delete

Robo assist



Show activities



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## Robo assist processes



Search processes

All processes (30)

### Request quotation

This automation allows you to cancel open order in system using Order ID



### Order cancellation

This automation allows you to cancel open order in system using Order ID



Ticket ID \*

48762374

Region \*

Australia



Reason \*

Product quality was not as expected

Execute

Cancel

Order cancellation & refund



All tickets > 5731407

New

Search



A



Reply



Add note



Forward



Close



Merge



Delete



Robo assist



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Reply



Add note



Forward



## Robo assist processes



Search processes

Executed processes (1)

### Order cancellation

This automation allows you to cancel open order

In progress

Time : 8 Mar 2020, 01:29 AM | Agent : Ashokkumar...

More



All processes (30)

### Request quotation

This automation allows you to cancel open order in system using Order ID



### Order cancellation

This automation allows you to cancel open order in system using Order ID



### Order cancellation & refund

This automation allows you to cancel open order in system using Order ID







All tickets > 5731407

New

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Add note



Forward



Close



Merge



Delete



Robo assist 1



Show activities



## Freshconnect Activation Request

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Forward



## Robo assist processes



Search processes

Executed processes (1)

### Order cancellation

This automation allows you to cancel open order

Completed

Time : 8 Mar 2020, 01:29 AM | Agent : Ashokkumar...

All processes (30)

### Request quotation

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### Order cancellation

This automation allows you to cancel open order in system using Order ID



### Order cancellation & refund

This automation allows you to cancel open order in system using Order ID



# The Results



- 100% of agents adopted and used the tool (after some edits and customizations).
- The bot ended up covering 80%+ of all order cancel scenarios via email and chat.
- The bot was used 600 times per day, resulting in ~50,000 uses within the first three months.
- AHT per order cancel email declined from 6 minutes to 1 minute and AHT per chat declined from 6 minutes to 3 minutes.
- Time saved during first 3 months = ~220,000 minutes (that's ~4,000 hours!)





# Why RPA

- It's cheaper, quicker, and easier than AI by removing decision-making power from machines.
- The retention of human agency works against redundancy fears on the part of agents and conditions them to see technology as their friend, not their enemy.
- You can still net substantial efficiency savings, even with human agency involve.
- RPA provides a baseline for automative benefits that can justify further investment in AI (as we shall soon see).
- RPA is eminently adoptable!



# To AI or Not To AI...



## Order Cancels via Email

Less additional time to save with AI  
**(\$.25 per contact, \$3k per month)** because  
the bot already closes out the conversation  
for the agent.

More ambiguity in customer intent - ie: the  
bot would determine if the customer's email  
fits the automation criteria based on just the  
original email content.



**No AI**

## Order Cancels via Chat

More additional time to save with AI  
**(\$.75 per contact, \$10k per month)** because  
the customer still has to keep the chat open  
to help the customer.

Less ambiguity in automation because a  
chatbot could ask questions and be sure of  
the customer's intent, even which order she  
wants to cancel.



**AI**



# How to Enact RPA

- Check your own (engineering) backyard for a green engineer who needs a way to get his or her feet wet.
- Find an up-and-coming AI/RPA company - just one LinkedIn or Google search away.
- Go the BPO route, since RPA does not require the technical complexity of AI and involves solely back-end processes.
- Mine your customer support people - find someone with basic code knowledge, sign up for an online training program (UIPath?), and four weeks later, you could have a low-level bot-builder!





# Thank you!

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