

Software Company



Investment Thesis: Chat and FAQ's

Investing in a real-time chat capability embedded with contextual knowledge articles will enhance customer experience, reduce support costs, and increase product adoption—resulting in higher retention, expansion revenue, and competitive differentiation.

Strategic Justifications

1. Accelerated Support Resolution

Hypothesis: Clients can resolve issues 30–50% faster via chat than through traditional ticketing/email.

Impact: Reduces time to value, improves CSAT, and shortens onboarding cycles.

2. Lower Cost to Serve

Chat with AI-assisted and self-service articles deflects Tier 1 support. Reduces need for human interaction on repetitive queries.

3. Higher Client Satisfaction & Loyalty

Real-time support meets modern expectations (especially via SaaS). Embedded knowledge fosters empowerment and perceived responsiveness.

4. Product Stickiness & Expansion Revenue

Quick access to help encourages deeper use of features. Increased user confidence = upsell opportunities and NRR growth.

5. Differentiator in Competitive Market

Competitors with slower response mechanisms (email/ticketing) will appear outdated.

Chat + knowledge makes support a feature, not a cost center.



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Improve Response and Resolution Time via Chat and FAQ's

With Salesforce Chat and Knowledge, our client drastically improved their service levels by providing chat capabilities directly in their software to allow for real time customer support.

Area	Metric	Impact
MTT Respond	Mean time to 1 st response	32 minutes to 6 minutes
MTT Resolve	Mean time to resolution	37 minutes to 10 minutes
CSAT	CSAT Survey responses	2.5 stars to 4.6 stars
Channel Engagement	% of clients per channel, "Reduce monthly calls"	Phone: ~75% to 42% Email: ~25% to 30% Chat: 0% to 28% Of 13,200 requests/ month, 3700 moved to chat

Process	Outcome
Objective	Determine a way to reduce call volume
Hypothesis	Chat & FAQs divert calls, add key feature to Chat to draw in users
Method	Build & train on FAQ's, provide Chat in app, gather usage & performance data and CSAT
Results	Reduced call volume, improved performance, increased CSAT
Recommendation	Build Portal with FAQs, Cases and Chat



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