MITSloan Management Review INDIA

Strategy Shift Forum

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Redesigning Customer Experience in the AI Era

Smart moves to serve faster, solve better, and lift customer satisfaction

Executive Summary

Customer service is changing fast. Customers expect clear answers, short waits, and one place to get things done. Teams want tools that lighten the load, not add to it. Drawn from insights shared at the Strategy Shift Forums in Delhi and Bengaluru, this playbook turns those expectations into four practical moves that any organization can run with limited lift and visible gains.

Start by getting questions to the right help faster. Use simple rules and existing history so common issues go to self-service and tricky ones reach the best person with full context. Give people instant answers to the top questions in chat and on the help page. Support agents while they work with suggestions and sources in the same window. Close the loop with a short follow-up so fixes stick and repeat contacts fall.

We focus on results leaders can track week by week. Lower handling time. Higher first-contact resolution. Stronger containment. Fewer escalations. A steady rise in customer satisfaction. The 90-day plan moves from setup to pilots to scale. You pick three high-volume topics, write short answers, set routing rules, and agree on the five numbers to watch. You then pilot in two areas, fix what does not work, and extend wins to the next queues.

Trust, data quality, and governance matter. Every suggested answer shows its source. Routing rules and escalation triggers are clear and auditable. Start small, measure often, and publish the scorecard every Friday. The aim is not to replace people. It is to remove friction, give time back to teams, and make every interaction simpler, faster, and more human.

The Four CX Plays at a Glance

Play 1:
Get Customers to the Right Help Faster

Set rules for routing. Use history to avoid repeat questions.

Play 4:
Follow Up and Close the Loop

Send short follow-ups. Offer next steps. Catch recurring issues early.

CX Focus:
Faster answers. Smarter support. Happier customers.

Play 2:
Quick Answers for Common Issues

FAQs, self-help, and smart suggestions reduce tickets.

Play 3:
Help Agents While They Work

Give real-time suggestions. Help agents respond faster.

Customer Experience Field Guide

The goal

Help customers get the right answer faster, without long waits, repeated questions, or getting passed around.

What changes

- Common questions are answered right away.
- Tricky issues go to the best person with all the context.
- Agents get help while working, and not after.

What to track

Handling time

How long it takes to resolve a customer issue from start to finish.

Aim to bring this down.

First-contact resolution

How often we solve the issue on the first attempt.

The higher, the better.

Escalations

How often issues are passed up the chain.

Less is better.

Containment

How many questions are fully handled without a human agent.

Good containment = fewer escalations.

Feedback

Customer satisfaction (CSAT) or net promoter score (NPS).

Keep an eye on this after every interaction.

1 | Get Customers to the Right Help Faster

What to do

Set up simple rules so that each customer question goes to the right person (or tool) based on what it's about. Use past interactions to avoid repeating the same questions.

Why it helps

- Reduces wait time.
- Cuts down back-and-forth.
- Ensures the right person handles the right problem.

What to watch

- Make sure the rules are clear about when to pass the case to a person.
- Keep a log of what's automated, so it can be checked later.

How to measure it

- Average handling time.
- First-contact resolution.
- Number of escalations.

CASE STUDY

A leasing customer reaches the end of a contract and chooses to sell back the vehicle. The service gives two paths on the same screen – do it yourself or get help from a specialist. When "get help" is chosen, the preference is captured and a callback is triggered. The same flow is configured as a small "topic" plus a retrieve-and-answer step that grounds responses in the company's own FAQ, so the handoff happens with context.

2 Quick Answers for Common Issues

What to do

- Make a list of questions customers ask often.
- Write short, simple answers and show them in chat or on your help page.
- Keep the answers updated and easy to read.

Why it helps

- Customers can solve problems on their own.
- Fewer new tickets are created.
- Agents spend more time on harder issues.

What to watch

- Always include a way to reach a person if the answer doesn't help.
- Update answers regularly to keep them accurate.
- Track which answers are helpful and which are not being used.

How to measure it

- Number of new tickets each week.
- Percentage of questions solved without an agent.
- Customer rating for the help answers (CSAT).

CASE STUDY

A hospitality support agent uses a customer-facing assistant that pulls answers directly from live documentation, FAQs, and the knowledge base. Routine requests are handled in chat, tickets are created when needed, and customers can check all open requests instantly. After three months, the team reports a seven-point drop in clarification requests to the service desk.

3 Helping Agents While They Work

What to do

- Show helpful suggestions to agents while they're chatting or on calls.
- Include things like: a reply they can send, steps to follow, or a reminder of the rules.
- Make it easy to change or add to the suggestion before sending.

Why it helps

- Agents don't waste time searching for information.
- They handle cases faster.
- New agents learn on the job more easily.

What to watch

- Make sure suggestions are accurate and make sense.
- Always show where the suggestion came from (policy, document, etc.).
- Let agents give feedback on what helped and what didn't.

How to measure it

- Time taken to close cases.
- Share of cases finished in one go.
- Agent feedback and training time.

CASE STUDY

A frontline seller opens a lead and invokes an in-window guide that assembles the next best steps such as verifying ID, checking eligibility, and sending a proposal, all from existing records. The assistant generates the proposal email in context and logs the action, so the rep spends time on the conversation, not the admin.

4 Follow Up and Close the Loop

What to do

- After solving an issue, send a short follow-up message.
- Ask if the problem stayed solved.
- Offer one simple next step or suggestion if it makes sense.

Why it helps

- Shows the customer you care.
- Catches problems early if they return.
- Can lead to extra help or future sales, if offered well.

What to watch

- Keep it short and helpful, and not pushy or full of marketing.
- Send it soon after the issue is closed.
- Make sure customers can easily say they're done or still need help.

How to measure it

- How many customers reply to follow-ups.
- How often issues re-open after follow-up.
- Customer rating after follow-up.

CASE STUDY

After a high-urgency issue hits the inbox, the agent gets a one-click resolution plan synthesized from policies and product docs. The plan also recommends "follow-ups analytics" so the team can track similar incidents over time and prevent repeats, turning a fix into a feedback loop.

“Nobody wants to be put on hold. What if our workforces had no limits, scaled any task 24/7, and delivered quality without compromise?”

Mankiran Chowhan, Salesforce India

“There is research showing that people who wear glasses are at least perceived as harder working, more honest, and more intelligent. It’s just a silly but scientifically supported example of how small things in our environment can actually have big perceptual and behavioural impacts.”

Patrick Fagan, Capuchin Behavioural Science

Scorecard and 90-Day Plan

SCORECARD

Make this your weekly checkpoint. Track what's working, flag what's not, and adjust course.

FOCUS AREA	NOW	TARGET	ACHIEVED	OWNER
Handling time (minutes)	8.5	6.5		CX Ops
First-contact resolution (%)	62%	72%		CX Lead
Containment (%)	22%	35%		Help Page Lead
Escalations (%)	17%	10%		Team Leads
Customer satisfaction	3.9	4.2		CX Head

90-DAY PLAN – A CHECKLIST

Weeks 0–2: Get ready

- Pick 3 common customer questions.
- Write short answers customers can use.
- List routing rules (who handles what kind of issue).
- Set up simple reports for the 5 focus areas.

Weeks 3–6: Try it out

- Start using the answers and routing rules for real.
- Coach agents using live suggestions.
- Review one KPI each week with the team.
- Fix what's not working and keep notes.

Weeks 7–12: Scale it

- Add 2 more questions to the help page.
- Give all agents access to suggestion tools.
- Share a weekly CX scorecard with managers.
- Check what changed and what to improve next.

WEEKLY CADENCE
Publish the CX scorecard every Friday and decide what to keep, fix, or expand for the following week.

Your Path to the Agentic AI Enterprise

Here's how companies can prepare to work with helpful AI across teams.These five traits describe what the best agent-ready platforms provide – in plain terms.

WHAT IT SHOULD BE	WHAT IT MEANS	WHAT YOUR PLATFORM NEEDS
Simple and Chat-Based	People should be able to ask for help in plain language – no menus, no jumping across tabs.	A chat-like workspace that brings together people, tools, documents, and help. This should feel like one window, not ten.
Supports Everyone	AI should take care of routine work so your team can focus on what matters most.	Agents for every role – like summarizing calls, updating forms, suggesting fixes, or drafting replies.
Same View of the Truth	Everyone should see the same facts – customers, agents, and systems.	A shared data foundation, no duplication. Clear labels and terms that humans and AI both understand.
Easy to Build and Change	Teams should be able to set up or tweak agents without waiting on IT.	One tool that lets you build, test, and improve agents across roles – using simple commands, not code.
Works Well with Others	Your platform must connect with apps you already use.	An open ecosystem with safe, plug-and-play agents and trusted partners that extend what you can do.

Note: The Salesforce perspective above is included for context.

References

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Resources

Watch highlights from the CX & Marketing Track at the Strategy Shift Forum 2025:

- **Delhi**
- **Bengaluru**

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