

AI Tools for Customer Success:

A Practical Evaluation Guide



- 71% of CS leaders report tools predict churn risk but can't explain why



- 75% of CS teams already use or plan to expand AI adoption



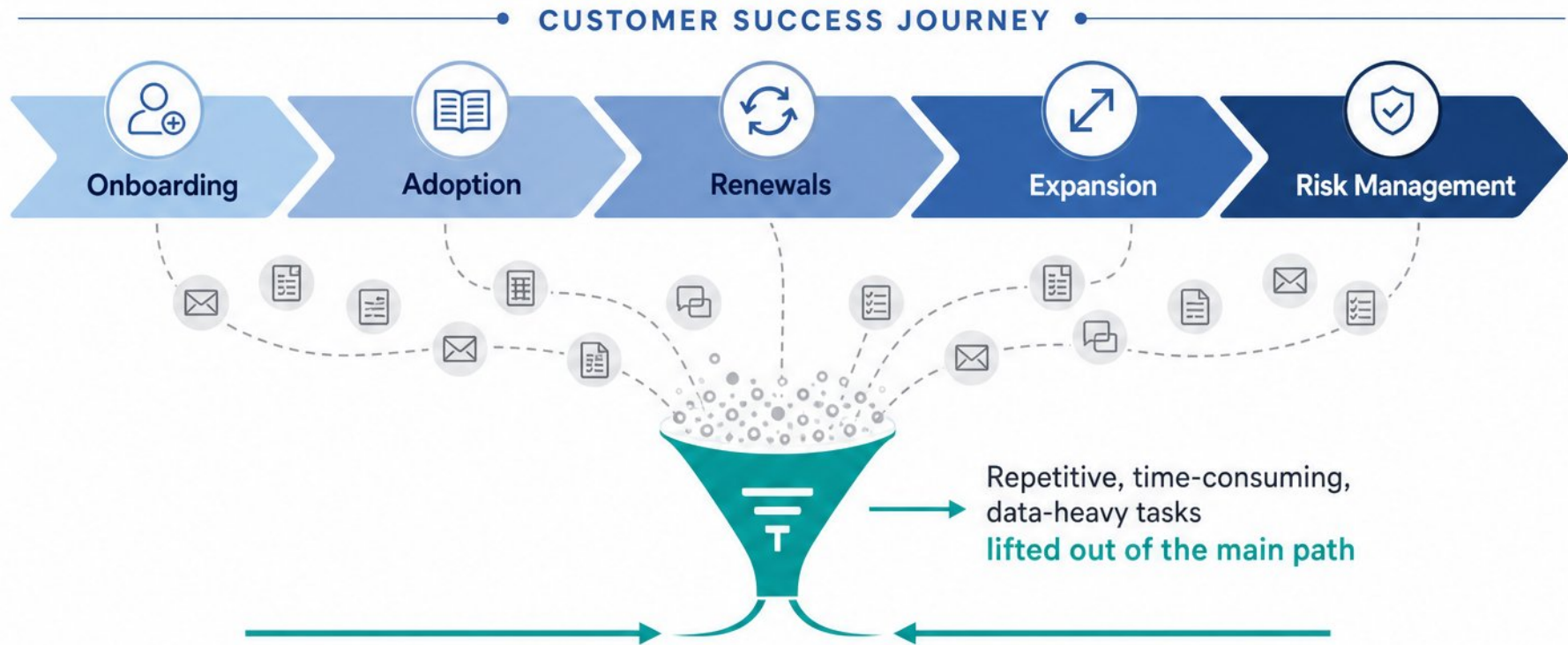
- Evaluate: workflow fit, tool categories, data readiness, governance, ROI



- Framework for evaluating, piloting, and adopting AI without losing the human touch



Starting Point: Your Current CS Workflow



- Map CS workflows: onboarding, adoption, renewals, expansion, risk management

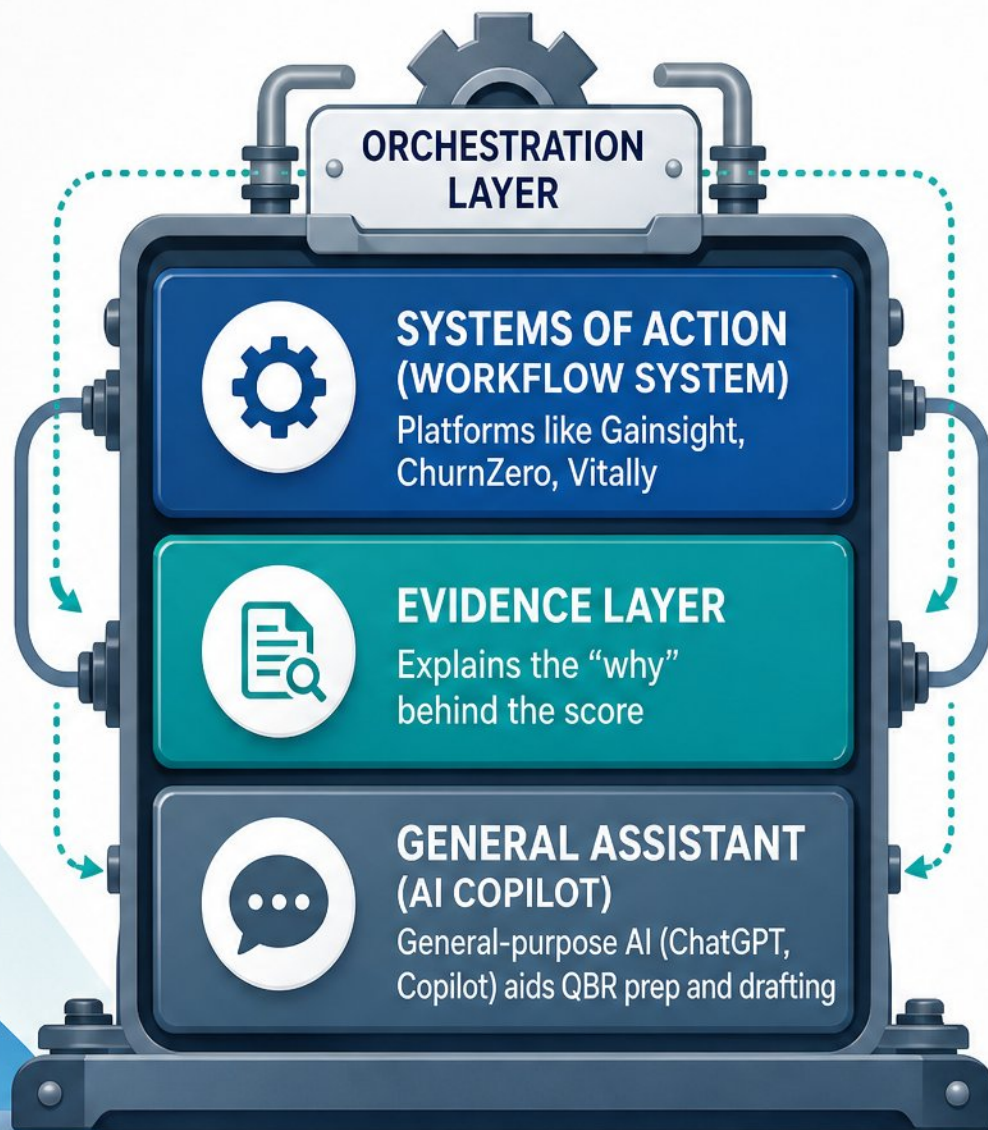


- Identify repetitive, time-consuming, data-heavy tasks draining CSM time



- Spot high-value AI assist areas versus tasks needing human judgment

The Three Jobs of AI-Assisted CS Tools



- Systems of action: platforms like Gainsight, ChurnZero, Vitally
- They own health scoring, playbooks, and renewal workflows
- Evidence layers explain the “why” behind the score
- General-purpose AI (ChatGPT, Copilot) aids QBR prep and drafting
- Choose tools based on workflow fit, not feature lists

Tool Categories That Matter



- Health scoring & playbooks: Gainsight, ChurnZero, Vitally



- Relationship intelligence explains the 'why' behind scores



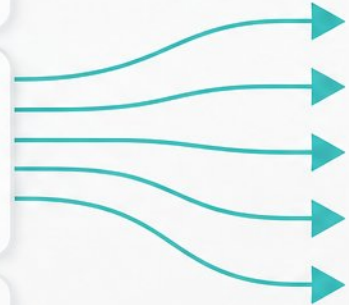
- Conversational AI: tier-1 onboarding & FAQ resolution



- Content assistance: QBR decks, summaries, drafting



- Voice-of-customer analysis: Medallia, Gong for insight



Evaluation Criteria for Your Team



- Evaluate on data readiness, workflow fit, ease of use, governance, time-to-value, and total cost



- Build a weighted scorecard, scoring AI features only on your own data



- Avoid risk: overlapping features, vendor lock-in, implementation complexity

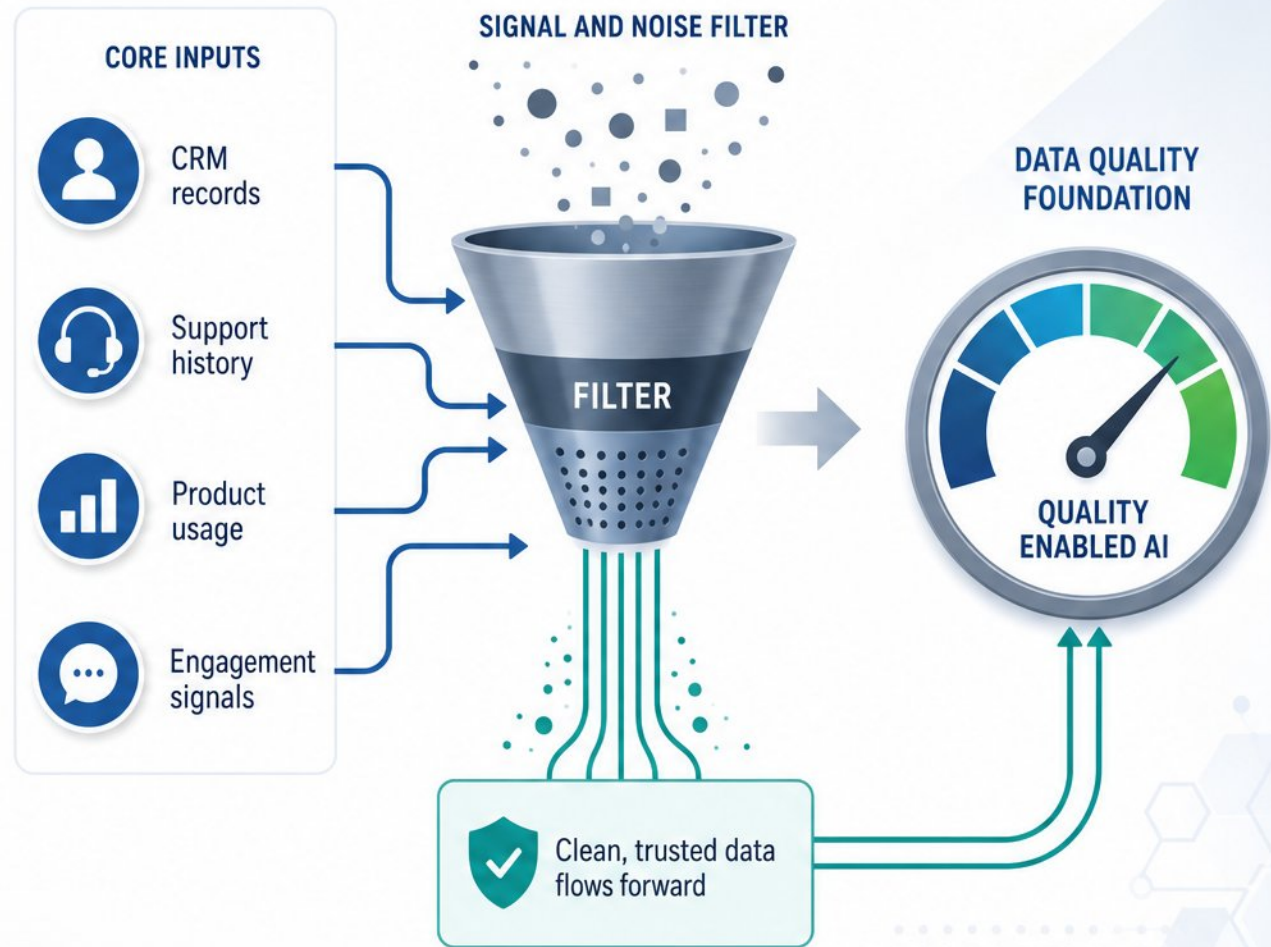


- Require real-data pilots, not just demos, before you commit



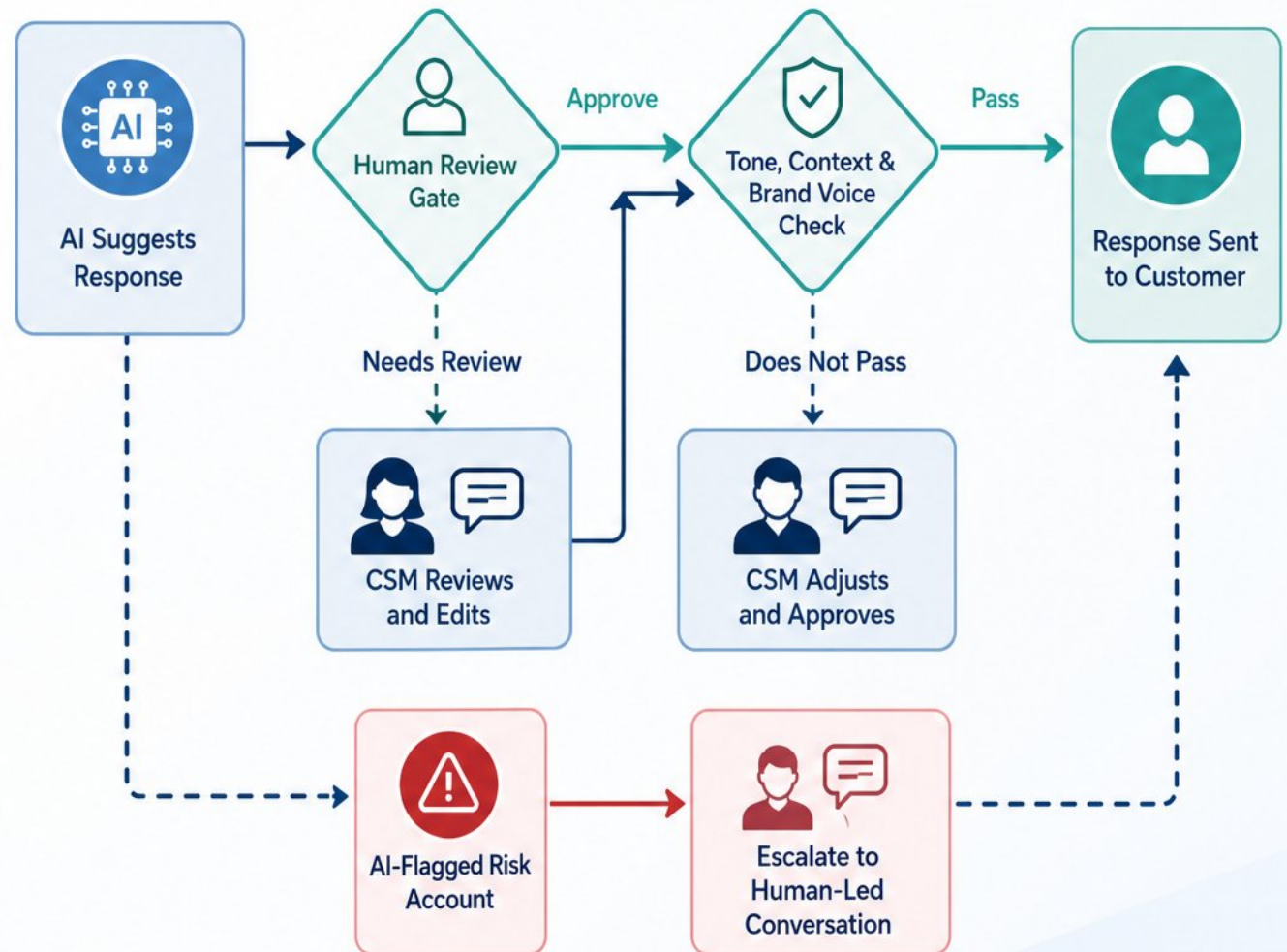
Data Readiness and AI Quality

- ✓ AI quality depends on data quality, not model choice—garbage in, garbage out
- ✓ Map core inputs: CRM records, support history, product usage, engagement signals
- ✓ Ensure identity resolution across systems and a unified customer profile
- ✓ Check data freshness and completeness thresholds before piloting tools
- ✓ Follow data governance: consent, PII protection, and audit trails are essential



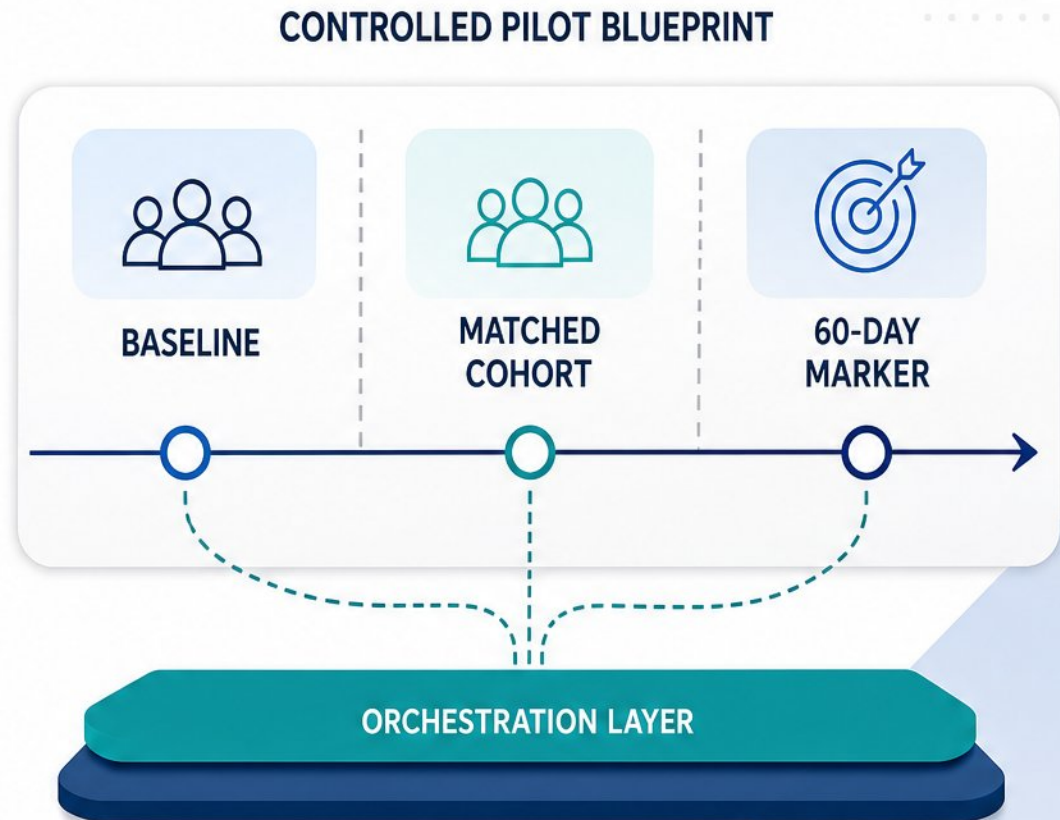
Using AI Without Losing the Human Touch

- Balance AI assistance with essential human judgment in key interactions
- Human-in-the-loop review gates guard tone, context, and brand voice
- Track the CSM override rate and target 15–25% to ensure genuine review
- Escalate AI-flagged risk accounts to human-led conversations



Pilot Design: Start Small, Measure Early

- Pilot one workflow: health scoring or QBR auto-prep first
- Define success metrics before launch—baseline 60 days minimum
- Track both CSM time halves: customer-facing vs. admin minutes
- Watch override rate: target 18–32% signals calibrated trust
- Expect efficiency gains first; full ROI lands in 6–12 months



Adoption and Team Enablement



- ✓ Enable adoption through training, feedback loops, and change management
- ✓ Track the AI override rate: under 18% risks rubber-stamping, over 32% indicates low trust
- ✓ Review override reasons in weekly coaching huddles to retune models
- ✓ Reinvest saved time into higher-value customer work, not headcount cuts
- ✓ Target: 15–25% override rate signals healthy CSM judgment and model quality

Risks, Governance, and Compliance



- Mitigate privacy, security, and data-governance risks across customer data



- Govern shadow AI through inventory, classification, and incident response



- Use SOC 2 Type II, DPAs, and audit trails as core evidence controls



- Verify vendor data-handling, residency, and sub-processor commitments

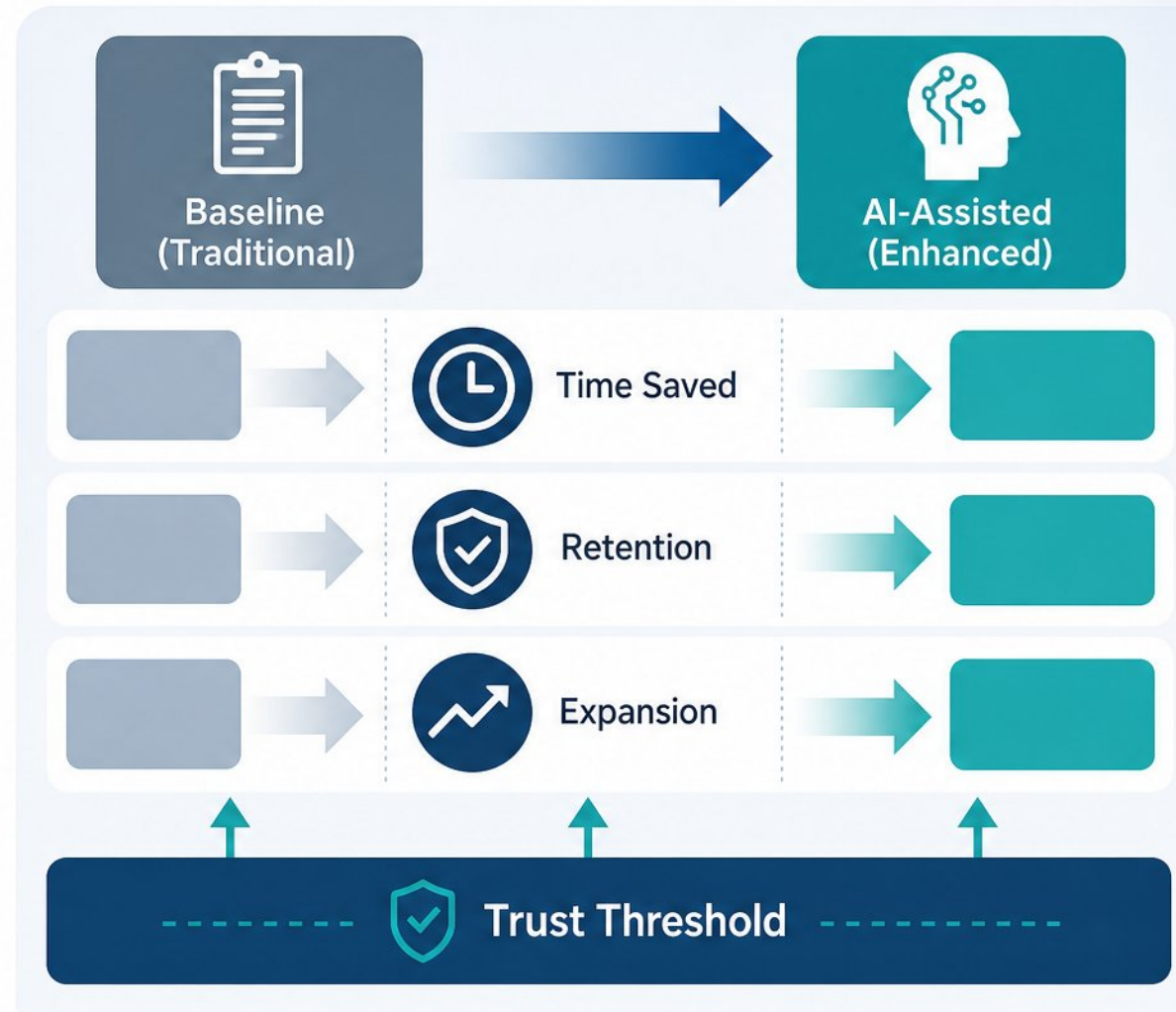


- Build human-in-the-loop review into AI-driven decisions and content



Measuring Business Impact

- – Track efficiency, revenue, and signal quality metrics
- – Use NRR, time saved, and response quality as key benchmarks
- – Compare against baselines with attributed impact
- – Review weekly operations, monthly outcomes, quarterly ROI



Practical Next Steps and Action Plan



- **Days 1-30:** Run a data readiness audit and prioritize one AI use case



- **Days 31-60:** Set a 60-day baseline and launch a small, measured pilot on internal workflows



- **Days 61-90:** Review signals (e.g., CSM override rate) and decide whether to expand or adjust



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/d8f526f9/public