

Map your current CX		
Question		Answer
What is our monthly volume?		12,500 (average across all channels)
How is it distributed across our channels?		70% Live Chat (we're starting with this channel) 20% Email 10% Phone
What is our current cost to serve?		\$4.80 / per conversation
What's our total monthly support spend?		~\$60,000 (12,500 × \$4.80)
What's our average handling time? (AHT)		4.5 minutes
What is our first response time? (FRT)		2 minutes
What is our CSAT?		82%
What's our agent headcount?		18 agents
What's our current retention rate?		88% (retained over a 12-month period)
Breakdown of volume by type		
Type	Description	Number
Investigative	Complex issues needing analysis or expertise.	Not needed right now
Personalized	Questions requiring customer-specific data	Not needed right now
Action-Based	Requests that require something to be done	Not needed right now
Informational	Questions that can be answered with content	8,125 (65%) 👉
For advice on how to calculate this figure, use our AI prompt. We'll focus first on informational queries (8,125), as they can be automated with just content.		

Initial scope		
Question	Notes	Answer
How many informational conversations do we get per month?	12500 x 65%	8,125
How many informational conversations do we get on live chat? ***Your Chat traffic may include a higher or lower percentage of informational queries than the overall average, use your own reporting to refine the estimate.	8,125 x 70% 70% of our volume comes in via Live Chat	5700
Will we automate all our informational live chat queries in our initial rollout?	We're just aiming to automate our FAQs first	No, the number will be less than 5700
What FAQs will we tackle first? / top volume drivers		
Plan Changes & Upgrades (1,200 / month) These are some of our most-used macros. Customers repeatedly ask how to switch plans, and the answer is consistent and policy-based. Data Usage & Limits (1,050 / month) A top Help Center search topic. Clear, factual responses that rarely require account intervention. Roaming Charges & Coverage (900 / month) Frequently asked before and after travel. High volume and driven by repeatable policy explanations. Voicemail Setup / Reset (800 / month) Step-based instructions with predictable patterns. Often resolved in a single exchange. Billing Fee Explanations (750 / month) Many are clarifications rather than true disputes. Stable content already exists. These focus areas account for around 4,700 of our monthly conversations on Live Chat.		
How many informational queries are we aiming to automate first?	We're aiming to automate 4,700 FAQs (by adding numbers above)	

Projected impact	
Question	Answer
What does it currently cost to handle these 4,700 FAQ conversations?	\$22,560 per month (4,700 × \$4.80 cost to serve)
What would it cost if Fin handled those 4,700 conversations?	\$4,653 per month (4,700 × \$0.99 Fin cost to serve)
How much would this save us?	~\$17,907 per month (\$22,560 - \$4,653) Reducing our \$60k per month to \$42k
Operational impact	
For your traditional metrics • First Response Time will now be instant for most conversations if you put Fin first. • Average Handling Time (Human) may increase as agents focus on complex work • CSAT will likely improve for simple queries New Metrics to Track • Involvement Rate How often Fin participates • Resolution Rate % resolved without human follow-up • Automation Rate % of total conversations fully resolved by Fin (Involvement Rate × Resolution Rate) • CX Score this is an AI generated CSAT for all your conversations Team Evolution • Shift from volume handling to complexity ownership • More time for product feedback and beta support • Ownership of AI training and content quality • Emergence of roles like AI Trainer, Knowledge Manager, or Conversation Designer	

AI Prompt

Role

You are an experienced Support Operations and AI Deployment advisor. Your job is to help me map my current support landscape and define a focused FAQ automation rollout. Be structured, practical, and concise.

Important Context

I will upload a completed version that is fictional and provided only to show structure and formatting. Do **not** use any numbers, assumptions, or company details from the example. Only use the real data I provide in this session.

Information You Need From Me

Ask for the following, one question at a time:

1. Monthly support volume
2. Channel mix (Chat / Email / Phone)
3. Cost to serve per conversation
4. Total monthly support spend (if not already calculated)
5. Average handling time (AHT)
6. First response time (FRT)
7. CSAT
8. Agent headcount
9. Retention rate
10. Estimated % of informational conversations
11. If that % is unknown, guide me through estimating it using:
 - a. Sampling recent conversations
 - b. Reviewing macros / saved replies
 - c. Checking top Help Center searches
12. Top recurring FAQ themes

If I don't know a figure, guide me through a lightweight estimation method. This is a scoping exercise — not a full taxonomy audit.

Conversation Type Definitions (For Estimation Only)

- Informational — Can be answered using content alone
- Personalized — Requires customer-specific data
- Action-Based — Requires a system change or update
- Investigative — Complex or expert-level troubleshooting

For this exercise, focus only on Informational queries.

Scope Constraints

We are:

- Launching on Live Chat first
- Focusing only on Informational queries
- Narrowing further to highest-impact FAQ themes

Do not expand into full multi-type automation strategy.

Expected Output Format

Structure the final output as:

1 Current CX Snapshot

Include all provided operational metrics.

2 Informational Scope

- Informational %
- Informational volume
- Informational volume on Live Chat

3 Initial FAQ Focus

- Top FAQ themes
- Estimated FAQ scope volume
- Rationale

4 Financial Impact

- Current FAQ cost
- Automated FAQ cost (~\$0.99 unless specified)
- Monthly savings
- New total support spend

5 Likely Operational Impact

- AHT
- FRT
- Resolution Rate
- Escalation Rate
- CX Score
- Automation Rate

Show calculations clearly. Do not reuse example data.