

Revamp the Live Chat Dashboard of AiSensy Platform. Mainly how would you think of restructuring the Active, Intervened, Requesting Section. Taking cases of 10+ Agents sitting on the same dashboard and solving queries. Create a PRD with the suggested changes and current blockers that you feel the dashboard has. The PRD should include a rough wireframe of the revamped version.

PRD: Optimizing AiSensy Live Chat Dashboard

1. Introduction

This Product Requirements Document (PRD) outlines the proposed improvements for AiSensy's live chat dashboard, focusing on optimizing performance, enhancing agent efficiency, and prioritizing customer requests to align with company goals such as increasing sales, revenue, and improving customer satisfaction.

2. Problems

The current live chat dashboard in AiSensy consists of three panes: Active, Requested, and Intervened. While these panes provide a basic structure, there are several limitations that hinder agent efficiency and the overall customer experience:

2.1 Limited Visibility in Active Chats

- **Lack of Context:** Active chats, where the AI bot interacts with customers without human intervention, lack sufficient context for agents to anticipate potential issues. Agents have limited insight

into whether an active chat might soon require intervention, leading to reactive rather than proactive support.

- **No Real-Time Alerts:** There's no system in place to alert agents about active chats that are escalating or require immediate attention based on customer sentiment or behavior. This can result in delays in addressing critical customer issues.

2.2 Prioritization Challenges in Requested Chats

- **Insufficient Information:** Requested chats, where human intervention is needed, offer minimal information for agents to effectively prioritize. Without detailed context such as customer segmentation, purchase history, or urgency indicators, agents struggle to identify high-priority requests.
- **Inability to Tailor Responses:** The system does not provide tailored response suggestions based on customer profiles, reducing the effectiveness and personalization of agent interactions. This can lead to generic responses that fail to address specific customer needs.

2.3 Inefficiencies in Intervened Chats

- **Lack of Differentiation:** Intervened chats, where agents have taken over from the AI bot, do not clearly differentiate between chats handled by the agent and those managed by teammates. This can cause confusion and inefficiencies, especially in team-based support environments.
- **Limited Historical Context:** Agents lack easy access to complete chat histories within the intervened pane, making it difficult to understand the conversation flow and provide informed responses.

2.4 General Workflow Inefficiencies

- **Manual Workload Management:** Agents currently manage workloads manually, leading to inefficiencies in handling multiple chats simultaneously. There is no system to automate chat distribution based on agent availability, expertise, or priority levels.
- **Limited Customer Segmentation:** AiSensy lacks advanced customer segmentation features. This limits the ability to deliver personalized, targeted support and hinders the effectiveness of broadcast messages.

3. Goals

3.1 Optimize Agent Efficiency:

- Enhance the ability of agents to manage and prioritize multiple chats seamlessly.
- Improve the speed and accuracy of agent responses to customer inquiries.

3.2 Elevate Customer Interaction Quality:

- Provide a more personalized and engaging experience for customers.
- Ensure timely and relevant responses to customer queries and concerns.

3.3 Boost Operational Effectiveness:

- Align the live chat system with key business objectives such as increasing revenue and lead conversion.
- Support improved customer experience through streamlined chat management.

4. User Personas

4.1 Persona 1: Support Agent

Description: Handles customer inquiries via live chat.

- **Needs:**
 - Quickly assess chat urgency and prioritize accordingly.
 - Access complete chat history for context.
 - Efficiently manage and transfer chats based on workload and expertise.

4.2 Persona 2: Customer Segments

Description: Customers interacting with the live chat platform can be segmented into different types based on their behavior and engagement with the company. These segments help companies tailor their strategies to improve specific business goals.

4.2.1 Segment 1: New Customers

Variables:

Variable	Value
Number_of_orders	1
Is_repeat	No
Order_status	Completed/Pending
Last_order_date	Within 30 days

Last_cart_item	High-interest product
Last_cart_item_size	Varies

Needs:

- Prompt and informative responses to build trust and encourage repeat purchases.
- Introduction to product offerings and benefits.

Company Focus:

- **Revenue and Sales:** Convert new customers into repeat buyers by highlighting promotions and related products.

4.2.2 Segment 2: Repeat Customers

Variables:

Variable	Value
Number_of_orders	>1
Is_repeat	Yes
Order_status	Completed
Last_order_date	Within 90 days

Last_cart_item	Preferred product categories
Last_cart_item_size	Consistent with previous purchases

Needs:

- Recognition and rewards for loyalty.
- Quick resolutions to any issues to maintain satisfaction.

Company Focus:

- **Customer Retention and Loyalty:** Offer loyalty programs and personalized promotions to enhance customer loyalty and increase lifetime value.

4.2.3 Segment 3: High-Value Customers

Variables:

Variable	Value
Number_of_orders	>5
Is_repeat	Yes
Order_status	Completed

Last_order_date	Within 90 days
Last_cart_item	High-value items
Last_cart_item_size	Large

Needs:

- VIP treatment with priority support.
- Exclusive offers and early access to new products.

Company Focus:

- **Revenue and High-Value Sales:** Provide exceptional service to maximize high-value transactions and encourage continued high spending.

4.2.4 Segment 4: Inactive Customers

Variables:

Variable	Value
Number_of_orders	>1
Is_repeat	Yes
Order_status	Completed

Last_order_date	>90 days
Last_cart_item	Various
Last_cart_item_size	Various

Needs:

- Re-engagement strategies to rekindle interest.
- Offers that incentivize returning to purchase.

Company Focus:

- **Customer Reactivation:** Implement campaigns to re-engage inactive customers through special offers or personalized communication.

5. Proposed Solutions

5.1 Improve Visibility and Context in Active Chats

Proactive Support Mechanism:

- **Real-Time Alerts:** Implement alerts for active chats showing signs of escalation or negative sentiment, using keywords like "issue," "problem," or "help."
- **Context Indicators:** Display customer information such as current page, time on site, and previous interactions directly within the active chat pane.

Enhanced Chat Overview:

- **Dashboard View:** Create a summary dashboard for active chats, highlighting those with potential issues and providing key details such as customer segment and sentiment score.

5.2 Enhance Prioritization and Information in Requested Chats

Priority Indicators:

- **Visual Cues:** Use color coding and icons to indicate priority levels (e.g., red for high-priority, yellow for medium-priority, green for low-priority).
- **Priority Tags:** Introduce tags like "High Value," "Urgent," and "New Customer" based on customer segments and keywords.

Comprehensive Chat Context:

- **Customer Profiles:** Display detailed customer profiles within the chat window, including variables like number_of_orders, last_order_date, is_repeat, order_status, last_cart_item, and last_cart_item_size.
- **Chat Context Panel:** Provide a scrollable chat context panel showing recent interactions, purchase history, and engagement level.

5.3 Improve Efficiency and Clarity in Intervened Chats

Chat Differentiation:

- **Ownership Indicators:** Use labels like "My Chats" and "Team Chats" to differentiate between conversations managed by the agent and those handled by teammates.
- **Agent Filters:** Implement filters to view chats based on agent ownership, expertise, and availability.

Accessible Chat History:

- **Complete History View:** Include a scrollable history view within the intervened chat pane, allowing agents to see the entire conversation flow with timestamps and participant changes.

5.4 Automate Workload Management

Automated Chat Distribution:

- **Distribution Algorithms:** Use algorithms to automatically assign chats to agents based on real-time availability, expertise, and priority levels.
- **Workload Balance:** Implement dynamic workload balancing to adjust agent assignments based on current chat volume and complexity.

Dynamic Workload Adjustments:

- **Real-Time Metrics:** Monitor metrics such as active chat count, response times, and agent idle time to dynamically adjust workloads and optimize efficiency.

6. Success Metrics

6.1 Revenue Increase

Description: Measure the increase in revenue generated through chat interactions.

How to Calculate:

- **Revenue Increase (%):**
$$\left(\frac{\text{Post-Implementation Revenue} - \text{Pre-Implementation Revenue}}{\text{Pre-Implementation Revenue}} \right) * 100$$

6.2 Lead Conversion Rate

Description: Measure the percentage of chat interactions that result in a lead conversion.

How to Calculate:

- **Lead Conversion Rate (%)**: $(\text{Converted Leads} / \text{Total Chats}) * 100$

6.3 Query Resolution Time

Description: Measure the average time taken to resolve customer queries through chat.

How to Calculate:

- **Average Resolution Time (minutes)**: $\text{Total Resolution Time} / \text{Total Resolved Queries}$

6.4 Customer Satisfaction (CSAT)

Description: Measure customer satisfaction with the chat interaction.

How to Calculate:

- **CSAT Surveys**: Conduct post-chat surveys asking customers to rate their satisfaction on a scale (e.g., 1 to 5).
- **CSAT Score (%)**: $(\text{Total Positive Responses} / \text{Total Survey Responses}) * 100$

6.5 Agent Efficiency

Description: Measure the efficiency of agents in handling chat interactions.

How to Calculate:

- **Chats per Hour**: $\text{Total Handled Chats} / \text{Total Active Hours}$

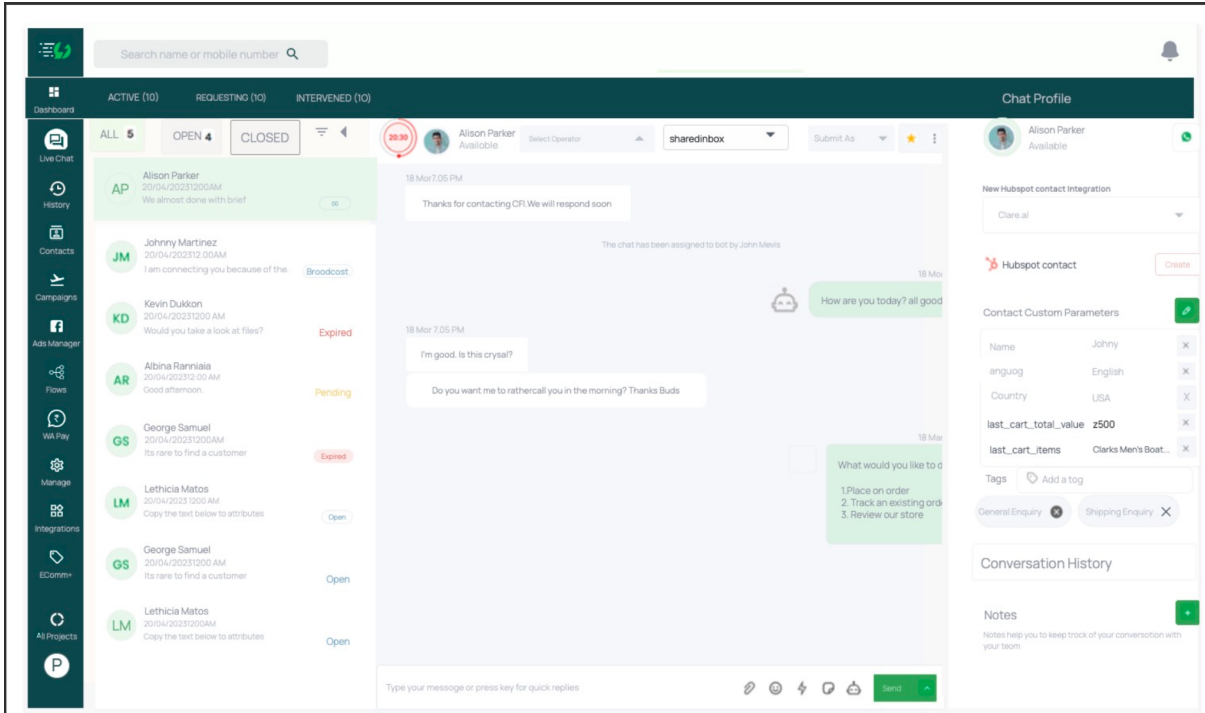
7. Milestones

To effectively implement the proposed solutions and address the identified problems, we have broken down the development process into user stories.

User Story	Tasks
1.As a support agent, I want to see visual priority indicators in the requested chats panel so that I can quickly identify and prioritize high-importance chats.	• Design priority icons and color schemes • Develop criteria for prioritization (customer segments, keywords, wait time). • Implement priority indicators in the chat interface.
2. As a support agent, I need to filter requested chats based on	• Develop filtering functionality based on priority levels.

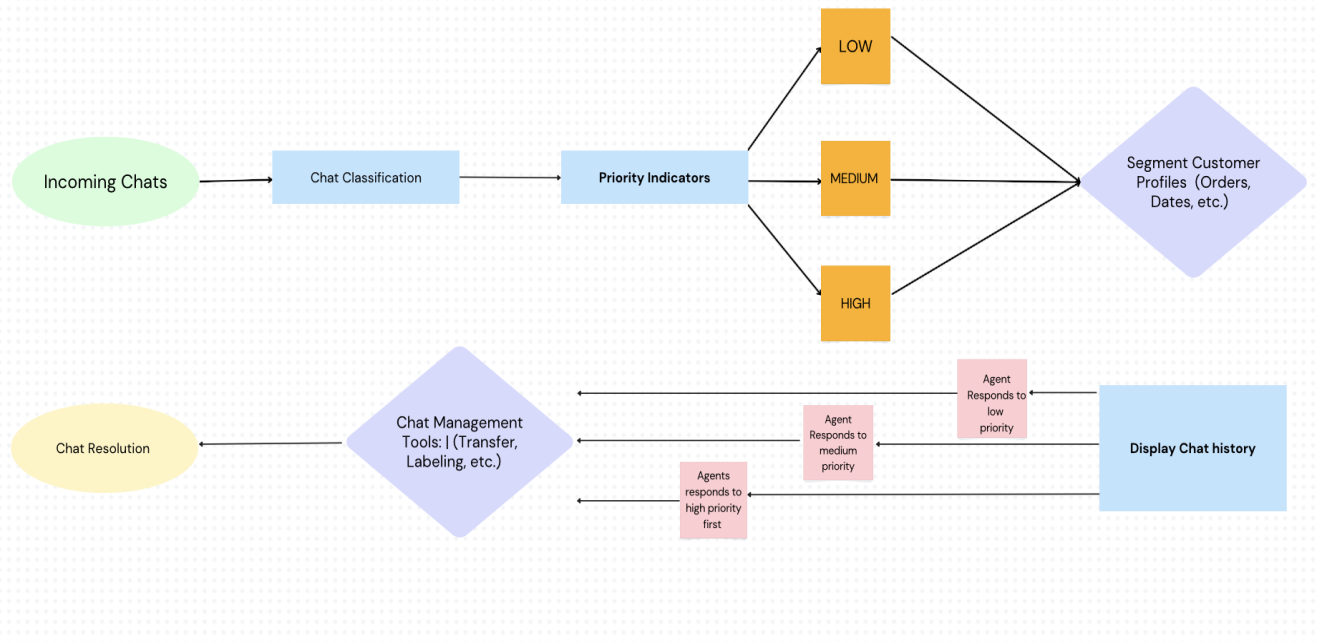
priority levels to manage my workload effectively.	● Integrate filtering options into the chat interface.
3. As a support agent, I want to view a complete scrollable chat history within each chat window so that I can understand the context of the conversation.	● Design the chat history layout. ● Integrate chat history with timestamps and participant changes. ● Ensure performance optimization for fast loading of chat history.
4. As a support agent, I want to see detailed customer profiles within the chat window to provide personalized support.	● Develop customer profile components showing number_of_orders, last_order_date, is_repeat, order_status, last_cart_item, and last_cart_item_size. ● Integrate customer profiles into the chat interface.
5. As a support agent, I want to use predefined flash responses for common inquiries to save time and increase efficiency.	● Create a library of flash responses for frequently asked questions and common scenarios. ● Develop a user-friendly interface for selecting and sending flash responses.

8.UI



9.Flow Diagram for AiSensy Live Chat Dashboard

Flowchart



10. Non-Functional Requirements (NFRs)

10.1 Security

Requirement: Ensure secure data storage and transmission of customer information.

- **Priority Indicators and Enhanced Chat History:** Secure implementation of visual indicators and chat history to prevent unauthorized access and ensure data privacy.
- **Advanced Customer Segmentation:** Safeguard customer profile data used for segmentation, ensuring that sensitive information is protected from breaches.

10.2 Performance

Requirement: Maintain responsiveness and fast loading times for the live chat dashboard.

- **Enhanced Chat History:** Optimize performance to ensure that chat history loads quickly and efficiently, even with extensive data.
- **Flash Responses:** Ensure that predefined flash responses are delivered instantly without causing delays in the chat interface.

10.3 Scalability

Requirement: Ensure that the system can handle increasing volumes of chat interactions and user data.

- **Advanced Customer Segmentation:** Design the segmentation algorithms to scale with growing customer data and interaction volumes.
- **Predictive Analytics:** Ensure that predictive models are scalable to accommodate increased data and more complex algorithms.

10.4 Compliance

Requirement: Adhere to relevant data protection regulations (e.g., GDPR, CCPA).

- **Advanced Customer Segmentation:** Ensure compliance with data protection regulations when handling and segmenting customer data.