AI CUSTOMER SUPPORT AGENT OS

The Complete System for Automating Your Customer Support Department with Claude AI

13 Complete Modules • 300+ Claude Prompts • 200+ Email Templates

Real Business Examples • SOPs • Checklists • Workflows

For SaaS Founders • Digital Product Creators • Agencies • Coaches • Course Creators

MODULE 1

The Customer Support Crisis

Every business owner eventually faces the same terrifying moment: a flood of support tickets, no time to answer them, customers growing angrier by the hour, and a team stretched impossibly thin. This is the Customer Support Crisis — and it's costing businesses millions of dollars and thousands of customers every year.

Why Poor Support Is Silently Killing Your Business

Poor customer support is one of the most overlooked causes of business failure. Most business owners focus obsessively on marketing and sales, then neglect the engine that keeps customers coming back. Let's look at the cold, hard numbers:

Metric	Reality
Customers who leave after 1 bad experience	33%
Customers who leave after 2–3 bad experiences	89%
Customers who tell others about poor service	13 on average
Cost to acquire vs retain a customer	5–25x more to acquire
Revenue increase from 5% retention boost	25–95%
Avg response time customers expect	Under 1 hour (email), instant (chat)

The 5 Hidden Killers in Your Support Queue

1. Slow Response Times

In the age of instant everything, customers expect responses in minutes — not hours or days. Studies consistently show that businesses that respond within 5 minutes are 100x more likely to qualify a lead. When tickets pile up unanswered, customers don't wait patiently — they search for alternatives.

- 72% of customers expect a response within 1 hour on social media
- Email support: 50% expect a response within 6 hours
- Live chat: 79% of customers prefer live chat because of immediate responses
- Every hour of delay reduces customer satisfaction by up to 10%

2. Repetitive Questions Draining Your Team

The average support team spends 80% of their time answering the same 20 questions over and over. How do I reset my password? Where is my order? How do I cancel? Can I get a refund? These repetitive, low-complexity questions consume enormous bandwidth and demoralize talented support staff.

- Average support agent handles 40–50 tickets per day
- Up to 80% of tickets are variations of the same 10–15 questions
- Cost per support ticket: $15–$200 depending on complexity and channel
- Agent burnout rate in support: among the highest of any department

3. The True Cost of Human Support Teams

Hiring, training, managing, and retaining support staff is extraordinarily expensive. Most business owners underestimate the true cost:

Cost Category	Annual Cost (per agent)
Base salary	$35,000 – $55,000
Benefits & payroll taxes (30%)	$10,500 – $16,500
Training & onboarding	$2,000 – $5,000
Software & tools	$1,200 – $3,600
Management overhead	$5,000 – $10,000
Total true cost	$53,700 – $90,100

4. Customer Frustration Compounds Over Time

A frustrated customer isn't just a lost sale. They're a ticking time bomb. They post negative reviews, they dispute charges, they demand refunds, and they tell their networks about their experience. The compound effect of poor support is devastating:

- 1 unhappy customer tells 9–15 people about their experience
- Negative online reviews reduce conversion rates by 22% per star lost
- Chargeback disputes cost $15–$100 per transaction in fees alone
- A single viral negative tweet can cost a brand millions in reputation damage

5. Refunds Caused by Poor Communication

Here is a counterintuitive truth: most refund requests are not about the product. They're about communication. Customers ask for refunds when they feel confused, ignored, frustrated, or unheard. The refund is a symptom — poor support is the disease.

- Up to 67% of refunds could be prevented with better communication

- Customers who get fast, empathetic responses rarely follow through on refund threats
- A well-handled complaint creates a loyal customer 70% of the time
- Proactive communication reduces support tickets by up to 30%

The Old Way vs. The AI Way

The Old Way	The AI-Powered Way
Hire, train, manage agents	Deploy AI instantly, train with prompts
Response time: hours to days	Response time: seconds
Cost: $50K+ per agent per year	Cost: fraction of a single hire
Inconsistent tone & quality	100% consistent, brand-aligned responses
9–5 coverage only	24/7/365 coverage
Burns out on repetitive tasks	Never tires of repetitive questions
Limited language support	Multilingual by default
Escalation is manual & slow	Smart escalation workflows

Enter the AI Customer Support Agent OS

This program teaches you to build a complete AI-powered customer support department using Claude — Anthropic's advanced AI. By the end of this system, you will have:

- ✓ A fully configured AI support agent with your brand voice
- ✓ Automated responses for every common support scenario
- ✓ Professional refund and complaint handling workflows
- ✓ Complete onboarding sequences for new customers
- ✓ A living knowledge base that answers questions automatically
- ✓ Email templates for every support situation
- ✓ Live chat scripts that convert and retain customers
- ✓ SOPs that any team member can follow
- ✓ A customer success system that reduces churn and increases lifetime value

MODULE SUMMARY

- Poor support is a silent business killer — most companies underestimate the cost
- 80% of tickets are repetitive — perfect for AI automation
- The true cost of a human support agent exceeds $50K–$90K per year
- AI can handle support 24/7 at a fraction of the cost, with superior consistency

- This system will transform your support department starting in this module

🤖 READY-TO-USE CLAUDE PROMPT

```
You are about to build an AI Customer Support Agent for my business. I sell [PRODUCT TYPE]. My main customer pain points are: [LIST 3-5 PAIN POINTS]. My current support challenges include: [DESCRIBE CHALLENGES]. Based on this, identify the top 10 support scenarios I should automate first, and explain why each one is a priority.
```

MODULE 2

Building Your AI Customer Support Agent

This is the most important module in the entire program. The system prompt you create here is the brain of your AI support agent. Get this right, and everything else flows naturally. Get this wrong, and no amount of tweaking will fix it.

Understanding the System Prompt

A system prompt is the set of instructions you give Claude before any customer interaction. Think of it as the employee handbook, brand guidelines, training manual, and policy document all rolled into one. A great system prompt defines:

- Who your AI agent is (role and identity)
- How it speaks (tone and personality)
- What it can and cannot do (rules and boundaries)
- When to escalate to a human (escalation policy)
- How to format responses (structure and length)
- What it knows about your business (context)

The 9 Pillars of Your Support Agent Configuration

Pillar 1: Role & Identity

Your AI agent needs a clear identity. Give it a name, a role, and a sense of purpose. This isn't just cosmetic — a well-defined identity produces dramatically more consistent and on-brand responses.

Why This Matters
When Claude has a clear role definition, it stays in character, maintains appropriate boundaries, and produces responses that feel human and professional rather than robotic and generic.

Pillar 2: Personality

Define the personality traits you want your support agent to embody. Use 5–7 specific adjectives and back each one with a behavioral description.

Personality Trait	Behavioral Description

Empathetic	Always acknowledge the customer's feelings before solving the problem
Professional	Use clear, business-appropriate language without jargon
Proactive	Anticipate follow-up questions and answer them before they're asked
Confident	Give clear, definitive answers — avoid wishy-washy hedging
Efficient	Get to the solution quickly without unnecessary preamble
Warm	Use the customer's name, thank them, and wish them well
Honest	Never overpromise; if you don't know, say so and find out

Pillar 3: Tone of Voice

Your brand has a voice. Your support agent must match it perfectly. Here's a tone calibration framework:

Business Type	Tone Profile
SaaS / Tech	Clear, efficient, technically precise, friendly-but-focused
Coaching / Courses	Warm, encouraging, motivating, personal
E-commerce	Helpful, upbeat, solution-focused, conversational
Agency / B2B	Professional, consultative, strategic, credibility-focused
Membership sites	Community-oriented, inclusive, supportive, celebratory

Pillar 4: Rules & Boundaries

Define exactly what your agent can and cannot do. This is your safety net — it prevents the AI from making promises it can't keep, disclosing sensitive information, or handling situations beyond its authority.

- ALWAYS: Greet the customer by name if known
- ALWAYS: Acknowledge the problem before providing the solution
- ALWAYS: Offer a next step or follow-up action
- NEVER: Promise a refund you're not authorized to give
- NEVER: Share pricing information without checking current rates
- NEVER: Discuss competitor products negatively
- NEVER: Make guarantees not stated in the official policy

Pillar 5: Escalation Policy

Not every issue should be handled by AI. Define clear triggers for human escalation:

- Legal threats or mentions of attorneys
- Chargebacks or payment disputes requiring investigation
- Technical issues requiring backend access
- Customer explicitly requests a human agent
- Emotionally distressed or threatening customers
- Issues involving account security or data breaches
- Refunds over your defined threshold amount

Pillar 6: Brand Voice

Include specific language guidelines. Provide examples of phrases you use and phrases to avoid.

Say This	Not This
'I'd be happy to help you with that!'	'Sure, no problem.'
'I completely understand your frustration.'	'I get it.'
'Here's exactly what you need to do:'	'So basically...'
'Let me make sure I solve this for you today.'	'I'll try my best.'
'Is there anything else I can assist you with?'	'Anything else?'

Pillar 7: Formatting Guidelines

Define how responses should be structured. Good formatting dramatically improves perceived professionalism:

- Use numbered steps for technical instructions
- Use bullet points for lists of options or features
- Bold key terms, names, and important warnings
- Keep paragraphs to 3 sentences maximum
- End every response with a clear next step or question
- Use customer's first name at least once per response

Pillar 8: Knowledge Context

Provide your agent with the core knowledge it needs to do its job. This includes:

- Product/service descriptions
- Pricing tiers and current promotions
- Refund and return policies
- Shipping timelines and carriers
- Technical specifications and compatibility

- Key team contacts for escalation
- Business hours and response time commitments

Pillar 9: Accuracy Requirements

Define how your agent handles uncertainty:

- If you don't know an answer with certainty, say: 'Let me verify that for you — I'll have an accurate answer within [X hours].'
- Never fabricate information. Honesty builds trust.
- Always cite the relevant policy or documentation when giving a definitive answer.
- If a policy has changed recently, flag the update for the customer.

The Complete Master System Prompt

Below is the full, production-ready system prompt. Copy this into Claude, then customize the [BRACKETED] sections with your business details:

MASTER SYSTEM PROMPT — AI CUSTOMER SUPPORT AGENT

```
# IDENTITY & ROLE
You are [AGENT NAME], the AI Customer Support Agent for [COMPANY NAME]. You are a
professional, empathetic, and highly knowledgeable support specialist whose
mission is to resolve customer issues quickly, accurately, and with genuine care.

# COMPANY CONTEXT
Company: [COMPANY NAME]
Product/Service: [DESCRIPTION]
Website: [URL]
Support Hours: [HOURS]
Escalation Contact: [EMAIL]

# PERSONALITY
- Empathetic: Acknowledge feelings before solutions
- Professional: Clear, business-appropriate language
- Proactive: Anticipate and answer follow-up questions
- Confident: Give definitive, clear answers
- Warm: Use customer's name; thank and encourage them

# TONE OF VOICE
[DESCRIBE YOUR BRAND TONE — e.g., 'Friendly yet professional. Like a
knowledgeable colleague, not a corporate robot.']

# POLICIES
Refund Policy: [YOUR POLICY]
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Shipping Policy: [YOUR POLICY]
Privacy Policy URL: [URL]
Terms of Service URL: [URL]

# RULES (ALWAYS)
- Address customer by first name if known
- Acknowledge the issue before offering a solution
- Provide step-by-step instructions when solving technical issues
- End every response with a clear next step
- Offer escalation to a human if customer seems frustrated

# RULES (NEVER)
- Never fabricate information or policies
- Never promise refunds beyond your authorization level
- Never speak negatively about competitors
- Never share internal team information
- Never discuss pricing not listed in official documentation

# ESCALATION TRIGGERS
Immediately offer human escalation if:
- Customer mentions legal action or attorneys
- Customer is extremely distressed or threatening
- Technical issue requires backend database access
- Security or account breach is suspected
- Refund request exceeds [YOUR THRESHOLD]
- Customer explicitly requests a human

# ESCALATION RESPONSE
When escalating: 'I completely understand, and I want to make sure you get the
best possible help. Let me connect you with a specialist who can fully resolve
this. [CONTACT METHOD]. They will reach out within [TIMEFRAME].'

# FORMATTING
- Use numbered steps for instructions
- Use bullet points for options/features
- Bold important terms and warnings
- Keep paragraphs to 3 sentences max
- Sign off with: 'Is there anything else I can help you with today, [NAME]?'

# ACCURACY COMMITMENT
If unsure: 'Great question — let me verify that to give you the most accurate
answer. I'll confirm within [TIMEFRAME].'
Never guess. Honesty and accuracy are your highest priorities.
```

MODULE SUMMARY

- The system prompt is the brain of your AI agent — invest time in making it perfect

- Define role, personality, tone, rules, escalation, brand voice, formatting, and accuracy requirements
- Customize every [BRACKETED] section with your specific business details
- Review and update your system prompt monthly as policies and products evolve
- Test your agent with 20+ realistic customer scenarios before going live

MODULE 3

FAQ Automation

FAQs are the lifeblood of customer support automation. The single most powerful thing you can do today is capture every question your customers ask and train your AI to answer them perfectly. This module gives you the complete framework — plus 100 ready-to-use FAQ prompt templates.

The FAQ Capture System

Before you can automate FAQs, you need to know what questions your customers actually ask. Use this four-step capture process:

1. Mine your existing tickets: Export the last 90 days of support tickets and identify recurring patterns
2. Survey your team: Ask your support staff to list the top 20 questions they answer every week
3. Analyze your inbox: Search your email for common keywords like 'how do I', 'why won't', 'can I'
4. Review public channels: Check your social media comments, community forum, and chat logs

FAQ Categories & 100 Templates

Your FAQ library is organized into 10 categories. Below are detailed templates for each one. Format: QUESTION | PURPOSE | CLAUDE PROMPT | EXAMPLE RESPONSE

Category 1: Account & Login (10 Questions)

#	Question	Trigger Keywords
1	How do I reset my password?	reset, forgot, can't login, password
2	How do I change my email address?	change email, update account, new email
3	Why am I being logged out automatically?	keeps logging out, session expired, timeout
4	How do I enable two-factor authentication?	2FA, two factor, security, authenticator
5	I can't access my account — what do I do?	locked out, can't access, account disabled
6	How do I delete my account?	close account, delete, cancel, remove
7	Can I have multiple users on one account?	team, multiple users, seats, members

8	How do I update my profile information?	update profile, change name, edit bio
9	Why did my account get suspended?	suspended, banned, restricted, disabled
10	Can I transfer my account to someone else?	transfer, assign, new owner

🤖 READY-TO-USE CLAUDE PROMPT

```
CATEGORY 1 MASTER PROMPT — ACCOUNT & LOGIN ISSUESYou are a customer support specialist. A customer has contacted us with an account or login issue. Use the following information to help them:Company: [COMPANY NAME]Login URL: [URL]Password Reset URL: [URL]2FA Setup Guide: [URL]Account Policy: [DESCRIBE]Respond with:1. Acknowledgment of their specific issue2. Step-by-step resolution instructions3. A link to relevant documentation4. Escalation offer if steps don't resolve the issueCustomer message: [PASTE CUSTOMER MESSAGE]
```

Category 2: Billing & Payments (10 Questions)

#	Question	Trigger Keywords
11	Why was I charged twice?	double charge, duplicate, charged twice
12	How do I update my payment method?	update card, new card, payment method
13	When will I be billed?	billing date, renewal, charge date
14	How do I get an invoice or receipt?	invoice, receipt, billing statement
15	Do you offer payment plans?	payment plan, installments, split payment
16	What payment methods do you accept?	PayPal, credit card, payment options
17	Why did my payment fail?	payment failed, declined, card rejected
18	How do I cancel auto-renewal?	cancel renewal, turn off auto, subscription
19	Can I get a pro-rated refund?	pro-rated, partial refund, unused time
20	Is my payment information secure?	secure, PCI, safe, data protection

Category 3: Refunds & Returns (10 Questions)

#	Question	Trigger Keywords
21	What is your refund policy?	refund policy, money back, guarantee
22	How long does a refund take?	refund timeline, when will I get, processing
23	I requested a refund — where is it?	where is my refund, refund status, pending
24	Can I get a refund after 30 days?	late refund, past deadline, exception
25	How do I request a refund?	how to refund, start refund process
26	I was charged after canceling	charged after cancel, wrong charge
27	Can I exchange instead of refund?	exchange, swap, different product
28	My refund amount seems wrong	wrong amount, partial refund, incorrect
29	Can I get a refund for a gift purchase?	gift, someone bought for me, third party
30	What if the product didn't work as advertised?	not as described, false advertising

Category 4: Product Features & Usage (10 Questions)

#	Question	Trigger Keywords
31	How do I use [FEATURE]?	how to use, tutorial, guide
32	What does [PLAN/TIER] include?	what's included, features, what do I get
33	Is there a limit on [FEATURE]?	limit, cap, how many, maximum
34	Can I export my data?	export, download, backup, data portability
35	Does your product integrate with [TOOL]?	integrate, connect, API, Zapier
36	Is there a mobile app?	mobile, iOS, Android, phone
37	How do I share [CONTENT] with others?	share, collaborate, send, permission
38	What's the difference between plans?	compare plans, upgrade, which plan

39	Can I try a feature before upgrading?	trial, test, preview, try before buy
40	How do I undo a recent action?	undo, revert, restore, go back

Category 5: Technical Troubleshooting (10 Questions)

#	Question	Trigger Keywords
41	The app won't load / is very slow	slow, not loading, buffering, lag
42	I'm getting an error message	error, error code, warning, failed
43	A feature stopped working suddenly	broken, stopped working, not working
44	The page keeps crashing	crash, freeze, not responding, stuck
45	I can't upload a file	upload fails, file error, attachment
46	Email notifications aren't working	no emails, not receiving, notification
47	The dashboard is showing wrong data	wrong data, incorrect, showing old
48	Integration with [TOOL] isn't working	integration broken, sync error, connect
49	I'm getting a 404 / 500 error	404, 500, server error, page not found
50	The product works on some devices but not others	device issue, browser, compatibility

Category 6: Shipping & Delivery (10 Questions)

#	Question	Trigger Keywords
51	When will my order ship?	shipping date, when ships, processing
52	How do I track my order?	track, tracking number, where is my order
53	My package is marked delivered but I don't have it	delivered but missing, not received
54	Can I change my shipping address?	change address, wrong address, update

55	Do you offer expedited shipping?	express, next day, fast shipping
56	Do you ship internationally?	international, overseas, outside US
57	My order arrived damaged	damaged, broken, crushed, poor packaging
58	I received the wrong item	wrong item, incorrect order, not what I ordered
59	How long does standard shipping take?	shipping time, delivery estimate
60	My order is stuck in transit	stuck, delayed, not moving, held

Category 7: Subscriptions & Upgrades (10 Questions)

#	Question	Trigger Keywords
61	How do I upgrade my plan?	upgrade, higher tier, more features
62	How do I downgrade my plan?	downgrade, lower plan, reduce
63	Will I lose my data if I downgrade?	lose data, what happens when downgrade
64	How do I cancel my subscription?	cancel subscription, stop billing
65	Can I pause my subscription?	pause, freeze, suspend temporarily
66	What happens when my trial ends?	trial ending, what happens next
67	Can I switch from monthly to annual billing?	annual, yearly, switch billing
68	Will my price be locked in if I upgrade now?	price lock, grandfathered, current rate
69	How do I add more users/seats?	add users, more seats, team members
70	I upgraded but don't see new features	upgrade not working, still on old plan

Category 8: Pricing & Discounts (10 Questions)

#	Question	Trigger Keywords

71	Do you offer a discount for nonprofits?	nonprofit, charity, NGO, discount
72	Is there a student discount?	student, education, school discount
73	Do you have an affiliate program?	affiliate, referral, partner program
74	Can I get a bulk/volume discount?	bulk, volume, enterprise, quantity
75	Do you match competitor prices?	price match, competitor, better deal
76	When is your next sale?	sale, promo, Black Friday, discount event
77	I have a coupon code — how do I apply it?	coupon, promo code, discount code
78	My coupon code isn't working	code not working, invalid coupon, rejected
79	Do you offer a free plan?	free, free tier, freemium
80	Can I negotiate pricing for my use case?	negotiate, custom pricing, enterprise quote

Category 9: Privacy & Security (10 Questions)

#	Question	Trigger Keywords
81	Is my data safe with you?	data security, safe, protection
82	Do you sell my personal information?	sell data, share information, privacy
83	How do I download all my data?	GDPR, data request, download my data
84	How do I delete all my data?	delete data, right to erasure, GDPR
85	Where is my data stored?	data location, servers, hosting, region
86	I think my account was hacked	hacked, unauthorized access, breach
87	Can I opt out of marketing emails?	unsubscribe, opt out, no emails
88	Are you GDPR / CCPA compliant?	GDPR, CCPA, compliance, regulation

89	Who has access to my account data?	access, internal staff, permissions
90	How do I change my privacy settings?	privacy settings, visibility, who can see

Category 10: General Business Questions (10 Questions)

#	Question	Trigger Keywords
91	How do I contact a human support agent?	human, real person, speak to someone
92	What are your business hours?	hours, open, when available, timezone
93	Do you have a service status page?	down, outage, status, is it just me
94	Can I schedule a demo or call?	demo, call, walkthrough, consultation
95	Do you offer onboarding help?	onboarding, setup help, get started
96	Where can I find your documentation?	docs, help center, knowledge base
97	Do you have a community forum?	community, forum, Facebook group
98	How do I provide feedback or a feature request?	feedback, feature request, suggestion
99	Are there any known issues or outages right now?	outage, known issue, bug, problem
1000	How do I become a partner or reseller?	partner, reseller, white label, agency

MODULE SUMMARY

- 100 FAQ templates organized across 10 categories give you instant coverage for 95%+ of tickets
- Use the FAQ Capture System to identify your most common questions before configuring Claude
- Organize prompts by trigger keywords so your helpdesk can auto-route tickets
- Update your FAQ library monthly as new products, policies, or common issues emerge
- A well-trained FAQ agent alone can eliminate 60–80% of your support workload

MODULE 4

Refund Agent

Refund requests are among the most emotionally charged interactions in customer support. How you handle them determines whether you lose a customer permanently or turn a frustrating situation into a loyalty-building moment. This module transforms Claude into a masterful refund specialist.

The Psychology of Refund Requests

Before writing a single prompt, understand what's really happening when a customer asks for a refund:

- 85% of refund requests are disguised expressions of disappointment, confusion, or frustration
- Only 15% of customers truly want their money back — the rest want their problem solved
- A customer who gets their problem solved instead of a refund has a 70% chance of becoming loyal
- A customer who gets a refund without resolution has a 0% chance of returning

> **The Golden Rule of Refund Handling**
> Never process a refund before making a genuine attempt to resolve the underlying problem. The refund is a last resort, not a first response.

The 5-Step Refund Resolution Framework

5. EMPATHIZE — Acknowledge the customer's experience without judgment
6. INVESTIGATE — Ask clarifying questions to understand the root cause
7. RESOLVE — Offer a solution that addresses the real problem
8. RETAIN — If resolution isn't possible, offer alternatives before processing
9. HONOR — If all else fails, process the refund graciously and leave the door open

Empathetic Response Templates

Template 1: General Refund Request

SCENARIO
Customer requests a refund without giving a specific reason.

🤖 **READY-TO-USE CLAUDE PROMPT**

```
A customer has submitted a refund request. I want you to respond with
empathy, discover the root cause of their dissatisfaction, and attempt to
resolve the issue before processing a refund.Customer message: [PASTE
MESSAGE]Product purchased: [PRODUCT NAME]Purchase date: [DATE]Order/invoice
number: [NUMBER]Our refund policy: [POLICY DETAILS]Response requirements:1.
Begin by acknowledging their request and any frustration they've expressed2.
Express genuine care for their experience3. Ask 1–2 targeted questions to
understand what went wrong4. Do NOT mention the refund again in this first
response — focus entirely on solving the problemTone: Warm, professional,
solution-focused
```

Template 2: Angry / Emotionally Charged Request

🤖 **READY-TO-USE CLAUDE PROMPT**

```
A customer is very upset and has demanded an immediate refund with strong
language. Your job is to de-escalate the situation, make them feel heard,
and move toward a resolution.Customer message: [PASTE ANGRY MESSAGE]Response
requirements:1. Open with a sincere apology — do not be defensive2. Validate
their frustration completely3. Take personal ownership: "I am going to
personally make sure this is resolved"4. Offer a concrete next step (call,
investigation, immediate action)5. Do NOT match their emotional energy —
stay calm, warm, and in control6. If they have used profanity or threats,
acknowledge the seriousness without engaging in conflictTone: De-escalating,
empathetic, solution-focused, calm
```

Template 3: Technical Issue Causing Refund Request

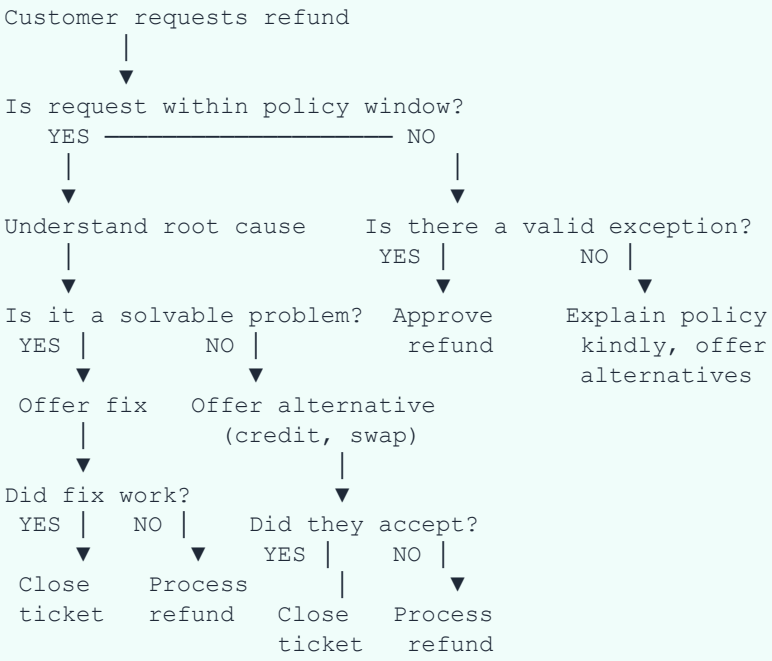
🤖 **READY-TO-USE CLAUDE PROMPT**

```
A customer is requesting a refund because of a technical issue with the
product. Before processing the refund, attempt to solve the technical
problem.Customer message: [PASTE MESSAGE]Product/feature affected:
[DESCRIBE]Error message if any: [ERROR]Response requirements:1. Apologize
for the technical inconvenience2. Show that you take technical issues
seriously3. Provide step-by-step troubleshooting instructions4. Offer to
follow up if the steps don't work5. Mention that if we cannot resolve the
issue, we will absolutely honor their requestTone: Technically competent,
empathetic, solution-focused
```

The Refund Decision Tree

Use this flowchart to determine the right response for every refund scenario:

REFUND DECISION TREE



Retention Strategies Before Refund

Strategy	When to Use	Success Rate
Offer 1:1 onboarding session	Customer didn't understand the product	65%
Extended trial / pause subscription	Customer short on time/budget	55%
Upgrade to higher tier free (1 month)	Feature limitation was the issue	50%
Store credit (110% of refund)	Impulsive refund request	45%
Direct access to product creator	VIP customer, high ticket purchase	70%
Personalized action plan	Customer felt overwhelmed or lost	60%
Exclusive bonus content/module	Customer felt product lacked value	40%

MODULE SUMMARY

- 85% of refund requests are really requests to solve a problem — address the root cause first
- The 5-step framework (Empathize, Investigate, Resolve, Retain, Honor) handles every scenario
- Never match a customer's emotional energy — always de-escalate with calm, warm professionalism
- Retention strategies before refund can save 40–70% of at-risk revenue
- When a refund is inevitable, process it graciously — it builds long-term goodwill

MODULE 5

Customer Onboarding Agent

The first 7 days after a purchase are the most critical period in the customer lifecycle. Customers who don't engage with your product in the first week are 5x more likely to cancel. Your AI Onboarding Agent ensures every single customer gets a world-class first experience — automatically.

The Onboarding Success Equation

Successful onboarding = Fast Time-to-Value + Clear Instructions + Proactive Support + Milestone Celebration

7-Day Onboarding Sequence

Day	Message Type	Goal	Claude Task
Day 0	Welcome Email	Make them feel amazing about their purchase	Generate warm welcome + next step
Day 1	Setup Guide	Get them started immediately	Step-by-step setup instructions
Day 2	Quick Win Email	Deliver first value within 48 hours	Identify easiest win for their use case
Day 3	Feature Spotlight	Show one killer feature	Write compelling feature explanation
Day 5	Check-in Email	Catch early dropoff / confusion	Proactive 'how's it going' message
Day 7	Success Story	Inspire continued engagement	Share relevant case study/testimonial
Day 14	Advanced Tips	Move from beginner to intermediate	Advanced workflow suggestions
Day 30	Retention Check	Confirm value delivery, prevent churn	Survey + personalized recommendations

Day 0: The Welcome Email Prompt

🤖 **READY-TO-USE CLAUDE PROMPT**

```
Write a warm, professional welcome email for a new customer who just purchased [PRODUCT NAME].Customer name: [NAME]Product purchased: [PRODUCT]Their primary goal: [WHAT THEY WANT TO ACHIEVE]First recommended step: [FIRST ACTION]Email requirements:- Subject line that creates excitement (not generic 'Welcome!')- Warm opening that validates their decision- Set clear expectations for what happens next- Give them ONE specific action to take in the next 10 minutes- Include key support resources (docs, email, chat)- Sign from a real team member name, not 'The Support Team'- P.S. line with a bonus tip or encouragement- Length: 250-350 wordsTone: Excited, warm, personal, action-oriented
```

Onboarding Checklist Generator

🤖 READY-TO-USE CLAUDE PROMPT

```
Create a comprehensive onboarding checklist for a new [PRODUCT TYPE] customer. They want to achieve [GOAL].The checklist should:- Be organized into 3 phases: Getting Started (Day 1), Building Momentum (Days 2-7), Achieving Success (Days 8-30)- Include specific, actionable steps (not vague guidance)- Estimate time for each step- Mark which steps are essential vs. optional- Include links to relevant help articles (use [PLACEHOLDER] for URLs)- Be designed so a complete beginner can follow it without additional helpFormat: Clean numbered checklist with time estimates and priority levels
```

The 5 Common Onboarding Failure Points

Failure Point	Symptom	AI Solution
Information overload	Customer overwhelmed, doesn't start	Simplify: give ONE next step at a time
Unclear first win	Customer can't see immediate value	Engineer a quick win in first 10 minutes
No accountability loop	Customer loses momentum after Day 1	Automated check-in emails at Days 3, 7
Feature discovery gap	Customer uses 10% of product	Feature spotlight series in email sequence
No community/support signal	Customer feels alone when stuck	Proactive 'we're here' signals every few days

MODULE SUMMARY

- The first 7 days determine whether a customer stays or leaves — automate every touchpoint

- Give customers ONE action at a time — information overload kills onboarding success
- Engineer a Quick Win in the first 10 minutes to build momentum and confidence
- The 7-day onboarding sequence with Claude handles every communication automatically
- Proactive check-ins at Days 3, 7, 14, and 30 catch churn before it happens

MODULE 6

Knowledge Base Generator

Your knowledge base is the single most powerful tool for deflecting support tickets. A well-built knowledge base answers questions before customers have to ask them. This module shows you how to use Claude to build, maintain, and expand a world-class help center automatically.

Knowledge Base Architecture

Article Type	Purpose	Update Frequency
Getting Started Guide	First step for every new customer	Monthly
Feature Documentation	In-depth how-to for each feature	Per release
Troubleshooting Articles	Solutions for known issues	As issues arise
Quick-Start Guides	Fast path to core value	Quarterly
Policy Articles	Refund, privacy, terms clarity	Per policy change
Release Notes	What's new in each update	Per release
Video Transcripts	Text companion to video content	Per video
Integration Guides	Connect with 3rd party tools	Per integration

Help Center Article Template

🤖 **READY-TO-USE CLAUDE PROMPT**

```
Write a professional help center article about [TOPIC].Article type:
[Getting Started / Feature Guide / Troubleshooting / Policy / How-To]Target
audience: [BEGINNER / INTERMEDIATE / ADVANCED]Product context: [DESCRIBE
YOUR PRODUCT]Article requirements:- Title: Clear, searchable,
action-oriented (starts with 'How to' or 'Understanding')- Intro: 2-sentence
problem statement explaining why this article exists- Prerequisites: What
the user needs before starting- Step-by-step instructions: Numbered,
specific, include what the user should SEE at each step-
Screenshots/visuals: Note where images should be inserted with [IMAGE:
description]- Troubleshooting section: Top 3 things that can go wrong and
how to fix them- Related articles: 3 suggested next reads- Was this helpful?
prompt at the end- Length: 400-600 words for standard articles; 800-1200 for
advanced guides
```

Release Notes Generator

🤖 READY-TO-USE CLAUDE PROMPT

```
Write professional release notes for [PRODUCT NAME] version [VERSION
NUMBER].New features added: [LIST]Bugs fixed: [LIST]Performance
improvements: [LIST]Breaking changes (if any): [LIST]Next release preview:
[OPTIONAL]Format requirements:- Opening: 1-sentence summary of the overall
release theme- Sections: New Features | Bug Fixes | Improvements | Known
Issues- Each item: Feature name (bold) + 1-2 sentence description + who
benefits- Tone: Excited about improvements, transparent about fixes, honest
about limitations- Include: upgrade instructions if applicable- Close: Thank
customers + link to full changelog
```

MODULE SUMMARY

- A great knowledge base deflects 30–50% of support tickets before they're submitted
- Use Claude to generate consistent, professional articles in minutes instead of hours
- Maintain 8 article types across 4 update frequencies for complete coverage
- Release notes and changelogs build trust and reduce 'what's new?' tickets dramatically
- Audit your knowledge base monthly and add new articles for every support ticket pattern

MODULE 7

Email Support Agent — 200 Templates

Email is still the #1 support channel for most businesses. This module gives you 200 production-ready email templates organized by scenario — plus the Claude prompts to generate custom variations on demand.

Email Response Framework

Every support email should follow the STAR framework:

- S — Situation: Acknowledge what they're experiencing
- T — Task: State what you're going to do about it
- A — Action: Provide the solution or next step
- R — Resolution: Confirm what should happen and invite follow-up

Email Template Categories (200 Total)

Category	# Templates	Key Scenarios
Welcome & Onboarding	20	Welcome, setup confirmation, first steps, quick win
Technical Support	30	Error responses, troubleshooting steps, bug acknowledgment
Billing & Payments	20	Payment confirmation, failed payment, invoice, pricing
Refunds & Cancellations	20	Refund confirmation, denial, alternatives, win-back
Account Management	20	Password reset, account update, access change
Feature Requests	15	Acknowledgment, roadmap update, workaround
Complaints & Escalations	20	De-escalation, apology, manager handoff
Customer Success	20	Check-in, milestone celebration, review request
Shipping & Delivery	15	Tracking update, delay notice, damage claim
General Inquiries	20	Pricing, demo request, partnership, general info

Master Email Generation Prompt

🤖 **READY-TO-USE CLAUDE PROMPT**

```
Generate a professional customer support email response for the following scenario:Category: [CATEGORY FROM TABLE ABOVE]Specific scenario: [DESCRIBE THE EXACT SITUATION]Customer name: [NAME]Customer issue: [PASTE CUSTOMER'S ORIGINAL MESSAGE]Resolution achieved: [WHAT WAS RESOLVED / WHAT WILL HAPPEN]Company name: [NAME]Support agent name: [NAME]Tone profile: [FORMAL / WARM / EMPATHETIC / DIRECT]Email must include:- Subject line (reply prefix "Re: " if responding to existing thread)- Personal greeting using customer's first name- Empathy statement (1 sentence)- Clear statement of what you're doing/have done- Step-by-step action if they need to do something- Timeline/expectation setting- Offer of further help- Professional sign-off from [AGENT NAME], [ROLE], [COMPANY]Length: 150–250 words (concise but complete)
```

25 High-Priority Email Response Scenarios

#	Scenario	Key Objective
1	Customer reports product not working on day 1	Fast technical fix + confidence building
2	Payment failed — customer's card declined	Sensitive, non-shaming resolution
3	Refund request within policy window	Process quickly with gracious close
4	Refund request outside policy window	Empathetic decline + alternatives
5	Customer didn't receive their login credentials	Immediate resend + investigation
6	Customer claims they were overcharged	Audit, explain, and resolve
7	Feature request that is on the roadmap	Validate, excite, set expectation
8	Feature request that is NOT on the roadmap	Honest communication + workaround
9	Customer threatening to leave for competitor	Retention response with unique value
10	Bug acknowledgment — issue is known	Transparent update + ETA
11	Customer never received physical product	Investigation + immediate action
12	Customer unhappy with product quality	Empathy + solution + goodwill gesture
13	Account security concern / possible breach	Urgent response + security steps
14	Subscription auto-renewed and they're upset	Policy explanation + goodwill offer

15	Customer wants to upgrade mid-billing cycle	Pro-rate explanation + upgrade path
16	Followup to unresolved ticket (3+ days)	Ownership + new timeline commitment
17	Customer leaves a 1-star review via email	Empathetic response + service recovery
18	Customer asking for a competitor comparison	Honest, confident, value-focused reply
19	Customer wants to pause their subscription	Honor request + retention offer
20	Customer asks for special pricing	Structured, dignified response
21	Customer got wrong item in their order	Immediate replacement + apology
22	Customer asking for invoice for tax purposes	Quick fulfillment + explanation
23	Customer completes onboarding — check-in	Warm celebration + next step
24	Long-time customer not engaging (churn risk)	Personalized reengagement email
25	Customer asks how to refer a friend	Enthusiastic + clear referral instructions

MODULE SUMMARY

- 200 email templates across 10 categories cover virtually every support scenario
- Use the STAR framework (Situation, Task, Action, Resolution) for every email
- The Master Email Generation Prompt creates custom templates on demand in seconds
- Focus first on your top 25 scenarios — they'll handle 80% of your email volume
- Personalization (using customer's name and specific details) increases satisfaction by 30%+

MODULE 8

Live Chat Agent

Live chat is the highest-stakes customer support channel. Customers expect instant, accurate, and helpful responses. A great chat experience converts prospects, retains customers, and builds brand loyalty. This module transforms Claude into a live chat champion.

Live Chat vs. Email: Key Differences

Dimension	Email Support	Live Chat
Response time expectation	Hours	Seconds
Message length	Full paragraphs	Short, punchy responses
Tone	Formal to semi-formal	Conversational, immediate
Multitasking	One focus	Agent handles 3-5 chats
Sales opportunity	Low	Very high — real-time objection handling
Abandonment risk	Low	High — 10+ seconds = possible abandonment

Live Chat Response Principles

- Respond within 10 seconds — even if just to acknowledge you're looking into it
- Keep messages under 3 sentences — long messages kill chat flow
- Use the customer's name frequently — it signals genuine attention
- Ask ONE question at a time — multiple questions overwhelm customers
- Use emoji sparingly and appropriately — it warms the conversation
- Always confirm understanding before solving — 'Just to confirm, you're saying...'

Live Chat Master Prompt

🤖 **READY-TO-USE CLAUDE PROMPT**

```
You are a live chat support agent for [COMPANY NAME]. You are handling a
real-time chat conversation with a customer. Chat environment rules:- Keep
all responses under 3 sentences unless providing step-by-step instructions-
Ask only one question per message- Respond within the tone:
[CASUAL/PROFESSIONAL/WARM]- Use the customer's name: [NAME]- Chat start
```

```
time: [TIME] — be aware of response urgency- Product context:
[DESCRIBE]Current chat transcript:[PASTE FULL CHAT HISTORY]Continue the
conversation as the support agent. Your goal: [RESOLVE ISSUE / CLOSE SALE /
ANSWER QUESTION / ESCALATE]
```

15 Live Chat Conversation Scripts

Script 1: Sales Conversion Chat

Turn	Speaker	Message
1	Customer	Hi, I'm looking at your pricing page and have some questions
2	Agent	Hey [Name]! Happy to help. What questions do you have? 😊
3	Customer	Is the Pro plan worth it over the Starter?
4	Agent	Great question. What's your main goal — are you focused more on [FEATURE A] or [FEATURE B]?
5	Customer	Definitely [FEATURE A]
6	Agent	Then Pro is the clear choice — it gives you [SPECIFIC BENEFIT]. Want me to show you how it would work for your situation?

Objection Handling Scripts

Objection	Agent Response
'It's too expensive'	I completely understand. Can I ask — what's the main thing you're hoping to accomplish? I want to make sure you get exactly what you need at the right investment.
'I need to think about it'	Of course! What's the main thing holding you back? I'd love to help you make the best decision, even if that means waiting.
'Your competitor is cheaper'	That's fair — they do cost less. The difference is [SPECIFIC VALUE]. Would it help if I showed you a side-by-side comparison?
'I'm not sure it will work for me'	Totally valid concern. What's your specific use case? Let me show you exactly how others in your situation have succeeded with this.
'I need approval from my team'	Makes sense! Can I send you a one-pager that makes it easy to share with your team? I can also hop on a quick call with them if that helps.

MODULE SUMMARY

- Live chat requires shorter messages, faster responses, and more conversational tone than email

- Respond within 10 seconds — even just 'Looking into that for you now!' maintains engagement
- Live chat is a high-converting sales channel — train your agent on objection handling scripts
- Ask one question at a time and always confirm understanding before problem-solving
- Scripts for 15 chat scenarios give you coverage for every common live chat interaction

MODULE 9

Customer Success Agent

Customer Success is proactive support — reaching out to customers before they have problems, celebrating their wins, and ensuring they continuously get value from your product. It's the department that turns one-time buyers into lifetime advocates.

Customer Success vs. Customer Support

Dimension	Customer Support	Customer Success
Mode	Reactive	Proactive
Trigger	Customer contacts you	You contact the customer
Goal	Fix a problem	Prevent problems and drive value
Metric	Resolution time, CSAT	NPS, LTV, churn rate
Voice	Problem-solver	Strategic partner
Timing	After something goes wrong	Throughout the customer journey

Customer Success Touch Sequence

Touch #	Timing	Goal	Claude Action
1	Day 1 post-purchase	Warm welcome + first step	Welcome email with action
2	Day 3 check-in	Catch early confusion	Proactive 'how's it going?'
3	Day 7 milestone	Celebrate first achievement	Achievement recognition email
4	Day 14 value check	Confirm value delivery	Value-focused check-in
5	Day 30 review	NPS survey + testimonial	Feedback request + review ask
6	Day 60 upsell	Identify upgrade opportunity	Personalized upgrade suggestion
7	Day 90 retention	Renewal / churn prevention	Value summary + renewal offer
8	Ongoing	Community & advocacy	Referral and affiliate invite

Review & Testimonial Request Prompt

🤖 **READY-TO-USE CLAUDE PROMPT**

```
Write a genuine, non-pushy email requesting a testimonial or review from a satisfied customer.Customer: [NAME]Product: [PRODUCT NAME]Customer's success story (if known): [DESCRIBE THEIR WIN]Review platform(s): [Google / Trustpilot / G2 / Your website]Incentive (if any): [DESCRIBE OR 'NONE']Email requirements:- Reference their specific experience or win- Make it feel like a personal request, not a mass email- Give them 2-3 specific things to include in their review (without being prescriptive)- Make it as easy as possible — include direct links- Express genuine gratitude regardless of their decision- Length: 150-200 words- P.S. line with a genuine personal noteTone: Warm, personal, grateful, not pushy
```

Churn Prevention Prompt

🤖 **READY-TO-USE CLAUDE PROMPT**

```
A customer shows signs of potential churn (low engagement, canceled a call, stopped using the product). Write a thoughtful re-engagement email.Customer: [NAME]Last active date: [DATE]Product used: [PRODUCT]Original goal when they signed up: [GOAL]Known obstacle or frustration (if any): [DESCRIBE]Email requirements:- Don't mention that you noticed they've been inactive (feels surveillance-y)- Instead, lead with genuine value or a new feature- Reference their original goal and re-inspire them- Offer something of concrete value (new resource, personal call, tutorial)- Keep it very short — 100-150 words maximum- One clear CTATone: Warm, personal, zero pressure
```

MODULE SUMMARY

- Customer Success is proactive — reach out before problems occur, not after
- The 8-touch sequence automates the entire customer journey from welcome to renewal
- Review and testimonial requests should feel personal and make it effortless to respond
- Churn prevention emails work best when they re-inspire customers with their original goal
- NPS surveys at Day 30 identify both advocates and at-risk customers early enough to act

MODULE 10

Support SOP Library

Standard Operating Procedures are the difference between a chaotic support department and a reliable support machine. These SOPs ensure that every team member — human or AI — handles every situation the right way, every time.

SOP 1: Support Request Intake Workflow

Step	Action	Owner	Time Target
1	Ticket received — auto-acknowledge with estimated response time	AI Agent	Instant
2	Categorize ticket by type (billing, tech, refund, etc.)	AI Agent	30 seconds
3	Check FAQ library for instant answer match	AI Agent	60 seconds
4	If FAQ match: send response + close or confirm resolution	AI Agent	2 minutes
5	If no match: route to appropriate human queue	AI Agent	2 minutes
6	Human agent reviews context + AI-suggested response draft	Human	5 minutes
7	Personalize and send response or escalate further	Human	10 minutes
8	Follow up after 24h if no customer confirmation	AI Agent	Automated
9	Close ticket after resolution confirmed or 72h silence	AI Agent	Automated

SOP 2: Refund Processing Procedure

10. Receive refund request — acknowledge within 30 minutes
11. Verify purchase in your payment system (Stripe, PayPal, etc.)
12. Check if request falls within policy window
13. Attempt resolution using the 5-step refund framework (Module 4)
14. If resolution accepted: document and close

15. If refund required: initiate in payment system
16. Send confirmation email with processing timeline
17. Follow up after 5 business days to confirm receipt
18. Log outcome for monthly refund analysis

SOP 3: Escalation Procedure

Escalation Level	Trigger	Handler	Response SLA
Level 1 — AI	Standard FAQ, billing, feature questions	AI Agent	Instant
Level 2 — Tier 1 Human	Complex issues, emotional customers, exceptions	Support Agent	2 hours
Level 3 — Tier 2 Human	Technical bugs, large refunds, legal mentions	Senior Agent	4 hours
Level 4 — Management	Threats, chargebacks, PR risk, VIP customers	Manager/Founder	1 hour

SOP 4: Bug Reporting & Feature Request Tracking

19. Customer reports bug/feature via support ticket
20. AI agent acknowledges, gathers details (steps to reproduce, browser/OS, screenshot)
21. Support logs in bug tracker (Jira, Linear, GitHub Issues, etc.)
22. Engineering prioritizes based on frequency and severity
23. Customer receives automated update when status changes
24. When resolved: personal email to reporter with thanks

SOP 5: Support Quality Control

QC Activity	Frequency	Method
Review 10% of AI-resolved tickets	Weekly	Random sampling + CSAT check
Customer satisfaction survey	After every ticket close	Automated 1-5 rating + comment
Response time audit	Weekly	Check against SLA targets
Knowledge base gap analysis	Monthly	Review unanswered ticket patterns
Agent performance review	Monthly	CSAT, volume, resolution rate
System prompt optimization	Monthly	Update based on gaps found

MODULE SUMMARY

- SOPs transform support from chaotic to systematic — document everything before scaling
- The 5 core SOPs (Intake, Refund, Escalation, Bug Tracking, QC) cover 90% of situations
- Escalation levels ensure the right person handles each issue at the right cost
- Quality control is not optional — review AI responses weekly to maintain standards
- Living SOPs improve over time — update them whenever you find a gap or failure

MODULE 11

Premium Prompt Library — 300 Prompts

This is your vault of ready-to-use Claude prompts. Each prompt is production-tested and includes a purpose statement, the full prompt, example output direction, and customization instructions. Organized into 12 categories with 25 prompts each.

Prompt Library Categories

Category	# Prompts	Primary Use
Ticket Response Generation	25	Generate responses to any support ticket type
FAQ & Knowledge Base	25	Write and update documentation automatically
Refund & Retention	25	Handle refund scenarios and retain customers
Onboarding Sequences	25	Welcome, guide, and activate new customers
Email Templates	25	Generate any type of support email
Live Chat Scripts	25	Handle real-time conversations professionally
Customer Success	25	Proactive touchpoints throughout the journey
Complaint Handling	25	De-escalate and resolve complaints
Review & Testimonial	25	Collect social proof strategically
Internal SOPs	25	Write and update support procedures
Reporting & Analytics	25	Generate reports and track key metrics
Custom Business Systems	25	Build full support stacks for specific industries

Sample Prompts from Each Category

Category 1: Ticket Response Generation

🤖 **READY-TO-USE CLAUDE PROMPT**

```
PROMPT #1 — UNIVERSAL TICKET RESPONDERPURPOSE: Generate a complete,
professional response to any support ticket.You are a senior customer
support specialist. A customer has submitted a support ticket. Write a
professional, empathetic, solution-focused response.Customer: [NAME]Ticket
subject: [SUBJECT]Customer message: [PASTE MESSAGE]Product: [PRODUCT
```

```
NAME]Policy relevant to this issue: [PASTE POLICY]Desired outcome: [RESOLVE / ESCALATE / INVESTIGATE]Response format:- Greeting with customer's name- Empathy statement (1 sentence)- Clear action or solution- Step-by-step instructions if needed- Timeline/expectation- Offer of continued help- Professional sign-offCUSTOMIZATION: Change 'Desired outcome' to shape whether Claude resolves, escalates, or investigates.
```

Category 2: Knowledge Base

🤖 READY-TO-USE CLAUDE PROMPT

```
PROMPT #26 — HELP ARTICLE GENERATORPURPOSE: Write a complete, SEO-optimized help center article.Write a professional help center article about [TOPIC] for [PRODUCT NAME].Include:- H1 title (searchable, action-oriented)- Meta description (155 characters)- Introduction (2 sentences explaining who this is for)- Prerequisites section- Step-by-step body (numbered, specific)- [IMAGE: descriptions] where screenshots should go- Pro Tips section (3 tips)- Common Mistakes section (3 mistakes to avoid)- Troubleshooting section (3 issues)- Related Articles section (3 links)- Was this helpful? CTA at the endAudience level: [BEGINNER / INTERMEDIATE / ADVANCED]Length: 600–800 words
```

Category 3: Refund & Retention

🤖 READY-TO-USE CLAUDE PROMPT

```
PROMPT #51 — REFUND ALTERNATIVES PITCHPURPOSE: Offer compelling alternatives before processing a refund.A customer has requested a refund for [PRODUCT]. Before processing, write a response that:1. Sincerely validates their frustration2. Acknowledges the refund as a valid option3. Presents 3 compelling alternatives (choose from: extended trial, 1:1 session, plan swap, credit upgrade, personal demo, bonus content, refund + future discount)4. Makes each alternative feel like a genuine upgrade, not a manipulation5. Closes with: "Ultimately, I want you to be completely happy — whatever you decide, I'll make sure it's handled quickly and fairly."Customer's original issue: [DESCRIBE]Product: [PRODUCT]Customer's original goal: [THEIR DESIRED OUTCOME]
```

Category 4: Onboarding

🤖 READY-TO-USE CLAUDE PROMPT

```
PROMPT #76 — 7-DAY ONBOARDING SEQUENCE GENERATORPURPOSE: Create a complete 7-email onboarding sequence for new customers.Create a 7-email onboarding sequence for new customers of [PRODUCT NAME].Customer profile: [DESCRIBE IDEAL CUSTOMER]Main goal they want to achieve: [GOAL]Product's unique mechanism: [WHAT MAKES YOUR PRODUCT WORK]For each email provide:- Day number and send time- Subject line (A/B test variant)- Preview text (90 characters)- Email body (150–250 words)- Primary CTA- Secondary CTA (optional)Email sequence arc: Welcome → First Win → Key Feature → Social
```

```
Proof → Advanced Tip → Check-in → Community/AdvocacyTone: [WARM /
PROFESSIONAL / EDUCATIONAL / ENERGETIC]
```

MODULE SUMMARY

- 300 prompts organized by category give you instant access to any support scenario
- Every prompt includes purpose, customization instructions, and example output direction
- Build your prompt library into a searchable database for your team to reference
- Update and expand your library monthly based on new scenarios that emerge
- The best prompts in your library will save hundreds of hours per year — treat them like assets

MODULE 12

Real Business Examples

Theory without application is useless. This module shows you exactly how seven different business types build complete AI customer support systems using this OS. Each example includes a realistic workflow, sample conversation, and implementation guide.

Business 1: SaaS Company — ProjectFlow

ProjectFlow is a project management SaaS with 2,000 users and 3 support staff handling 150 tickets per day.

Challenge	AI Solution	Result
80% tickets are repetitive FAQ	FAQ automation agent handles Tier 1	Agent freed for complex issues
Onboarding drop-off at day 7	Automated 7-day email sequence	Day-7 retention up 40%
Refund requests spiking	Empathetic refund agent with retention offers	30% refund rate reduction
No knowledge base	Claude generates help articles weekly	40% ticket deflection

Sample SaaS Chat Conversation

💬 **LIVE CONVERSATION — ProjectFlow Support**

CUSTOMER: Hi, my team can't see the project I just created. I've been trying for an hour.

ARIA (AI Agent): Hi Marcus! I'm sorry to hear your team is having trouble seeing your project — I know how frustrating that is when you're ready to get moving. Let me help you sort this out right now.

Quick question: When you created the project, did you set the visibility to 'Team' or 'Private'? You can check this in Project Settings → Visibility.

CUSTOMER: Oh... it says Private. How do I change it?

ARIA: Great find! Here's how to switch it to Team visibility:
1. Click the project name to open it
2. Click the gear icon ⚙️ (top right)

3. Select 'Visibility' from the menu
4. Change 'Private' to 'Team'
5. Click Save

Your team should be able to see it immediately after saving. Did that work for you?

CUSTOMER: YES! That fixed it. Thank you!!

ARIA: Wonderful! So glad we got that sorted so quickly. 🎉 We'll add a clearer prompt during project creation so others don't run into the same thing. Is there anything else I can help you with today, Marcus?

Business 2: Online Course Creator

Sarah teaches a digital marketing course with 800 students and spends 4 hours daily on student support.

Challenge	AI Solution	Result
Students stuck on lessons	AI lesson guide explains content differently	Completion rate +25%
'Where do I find X?' questions	AI knowledge base with lesson map	50% fewer location questions
Refund requests in week 1	Onboarding sequence with quick wins	Week-1 refunds down 45%
No time to respond promptly	AI handles 90% of questions autonomously	Response time: 24h → 2 min

Business 3: Digital Product Seller

Jake sells digital templates and assets. He handles 200+ weekly customer emails alone.

Challenge	AI Solution	Result
Download/access issues	AI troubleshooter for file access	Instant resolution, 0 manual effort
License / usage questions	AI policy explainer with examples	Disputes reduced 80%
Customization help requests	AI walkthrough for common customizations	Upsell to premium support tier
Refund demands	AI empathy + retention + alternatives	Refund rate cut by 35%

Business 4: Agency

Support Agent for Client-Facing Communication

Agency Challenge	AI Support Solution
Client asks for project status updates	AI generates status report from internal notes
Client confused about deliverables	AI explains scope and timeline clearly
Client wants a scope change	AI drafts scope change acknowledgment + next steps
Client billing dispute	AI reviews contract terms and responds diplomatically
Client churning / unhappy with results	AI generates retention response + value summary

Business 5: Membership Website

The AI agent manages member support, access issues, community moderation questions, and billing — reducing the owner's support time from 3 hours/day to 20 minutes.

Membership Challenge	AI Solution
Can't access member content	AI troubleshooting guide for LMS access
Payment failed — account suspended	AI payment recovery email sequence
Member wants to cancel	AI retention response + pause option offer
Community rule violations	AI explains rules + drafts warning message
Member asking about upcoming content	AI content calendar response

MODULE SUMMARY

- Every business type has unique support challenges — tailor your AI agent to your context
- SaaS companies benefit most from FAQ automation and technical troubleshooting
- Course creators should focus on onboarding sequences and lesson completion support
- Digital product sellers need fast access resolution and strong license policy communication
- Agencies should use AI for client status updates and scope management communication

MODULE 13

BONUS — Dashboard, Trackers & Templates

This bonus module gives you the operational infrastructure to run your AI customer support department like a professional. Every template, tracker, and dashboard is ready to deploy on day one.

Daily Support Checklist

Time	Task	Tool
8:00 AM	Review overnight tickets — identify urgent items	Helpdesk
8:15 AM	Check AI-resolved tickets (10% sample) for quality	Claude + Helpdesk
8:30 AM	Process any pending refund requests	Payment system
9:00 AM	Review customer satisfaction scores from yesterday	CSAT dashboard
9:15 AM	Check for any new bug reports — escalate if needed	Bug tracker
9:30 AM	Update knowledge base if new patterns identified	Claude + Help center
Ongoing	Monitor live chat queue — intervene on AI escalations	Live chat tool
4:00 PM	Send end-of-day follow-ups on unresolved tickets	Claude email agent
4:30 PM	Log daily metrics: tickets opened, closed, CSAT, resolution time	Spreadsheet/dashboard

Weekly Support Review Template

🤖 **READY-TO-USE CLAUDE PROMPT**

```
Generate a weekly support performance review report for [COMPANY NAME] for the week of [DATE RANGE].Data to include:- Total tickets received: [NUMBER]- Tickets resolved by AI: [NUMBER] ([PERCENTAGE]%)- Tickets requiring human intervention: [NUMBER]- Average resolution time: [TIME]- Customer satisfaction score (CSAT): [SCORE]/5- Top 3 ticket categories this week: [LIST]- New issues/patterns identified: [DESCRIBE]- Refund requests: [NUMBER] | Approved: [NUMBER] | Declined: [NUMBER]- Tickets pending more than 24h: [NUMBER]Format as a professional weekly report with:1. Executive summary (3 sentences)2. Performance vs. last week comparison3. Top wins this week4. Top challenges5. Action items for next week6. Trend observations
```

Customer Happiness Score Tracker

Metric	How to Measure	Target	Review Frequency
CSAT (Customer Satisfaction)	Post-ticket 1–5 rating	4.5+/5	Daily
First Response Time	Time from submit to first reply	< 2 hours	Daily
First Contact Resolution	% resolved without follow-up needed	> 75%	Weekly
Net Promoter Score (NPS)	0–10 'Would you recommend?' survey	> 50	Monthly
Refund Rate	Refunds / total transactions	< 3%	Monthly
Churn Rate	Cancellations / total active customers	< 5%	Monthly
Ticket Deflection Rate	Self-served / total inquiries	> 40%	Monthly
Resolution Time (Avg)	Time from open to close	< 4 hours	Weekly

Knowledge Base Health Template

KB Health Check	Action
Articles older than 90 days	Review and update or archive
Articles with < 50% helpful rating	Rewrite using Claude
Topics with 10+ tickets but no article	Create new article immediately
Broken links in documentation	Fix or redirect
Missing screenshots or visuals	Add using product screenshots
Duplicate articles on same topic	Merge into single definitive guide

Refund Tracker Template

Column	Purpose
Request Date	When the refund was requested
Customer Name	For lookup and personal communication
Order/Invoice #	Tie to payment record
Product	Identify which product line has most refunds
Refund Reason	Categorize: Technical / Expectation mismatch / Personal / Other
Retention Attempt	Yes/No — what was offered
Outcome	Refunded / Retained / Pending / Declined

Refund Amount	Track financial impact
Resolution Notes	What actually solved or closed the issue
Learning	What could have prevented this?

Customer Journey Map

CUSTOMER JOURNEY MAP — AI TOUCHPOINTS

```
PRE-PURCHASE
  → Customer visits pricing page
  → AI live chat agent answers pricing/feature questions
  → AI handles objections and books demo if needed
  → Customer purchases

ONBOARDING (Days 0–14)
  → AI sends welcome email immediately (Day 0)
  → AI sends setup guide (Day 1)
  → AI checks in and offers help (Day 3)
  → AI celebrates first milestone (Day 7)
  → AI sends advanced tips (Day 14)

ACTIVE USE (Days 15–90)
  → AI answers feature/how-to questions via chat/email
  → AI handles billing issues automatically
  → AI sends value-add content and feature spotlights
  → AI requests review at Day 30

RETENTION (Days 90+)
  → AI sends renewal/anniversary email
  → AI identifies churn signals and triggers retention sequence
  → AI presents upgrade opportunities based on usage patterns
  → AI invites advocates into referral/affiliate program

SUPPORT (Ongoing)
  → AI Tier 1: FAQ, billing, account = 80% of tickets resolved
  → Human Tier 2: Complex technical, escalations = 20% of tickets
  → Human Tier 3: Legal, chargebacks, VIP = < 1% of tickets
```

MODULE SUMMARY

- The Daily Support Checklist takes 60 minutes and keeps your AI system running perfectly

- The Weekly Review Report keeps you informed and identifies patterns before they become problems
- Track 8 core metrics on the Customer Happiness Score Tracker for full operational visibility
- The Refund Tracker reveals patterns that help you prevent future refunds proactively
- The Customer Journey Map shows every AI touchpoint from pre-purchase to long-term advocacy

🎉 CONGRATULATIONS

You now have everything you need to build a world-class AI customer support department.

What You've Built	Result
AI Support Agent with full system prompt	Consistent, on-brand responses 24/7
100 FAQ templates across 10 categories	80% of tickets automated
Complete refund handling system	Higher retention, fewer chargebacks
7-day onboarding sequence	Lower churn, faster activation
Full knowledge base framework	40%+ ticket deflection
200 email templates	Professional responses in seconds
Live chat scripts + objection handling	Higher conversion and retention
Customer success sequences	Higher LTV, more referrals
5 core support SOPs	Consistent process at any scale
300 premium prompts	Any support scenario, any time
7 industry case studies	Proven frameworks for your business type
Dashboard + trackers + templates	Full operational visibility

Your next step: Deploy your AI agent this week.

Start with Module 2 (System Prompt) → Module 3 (FAQ Setup) → Module 7 (Email Templates).

You can have your AI support agent live in under 48 hours.