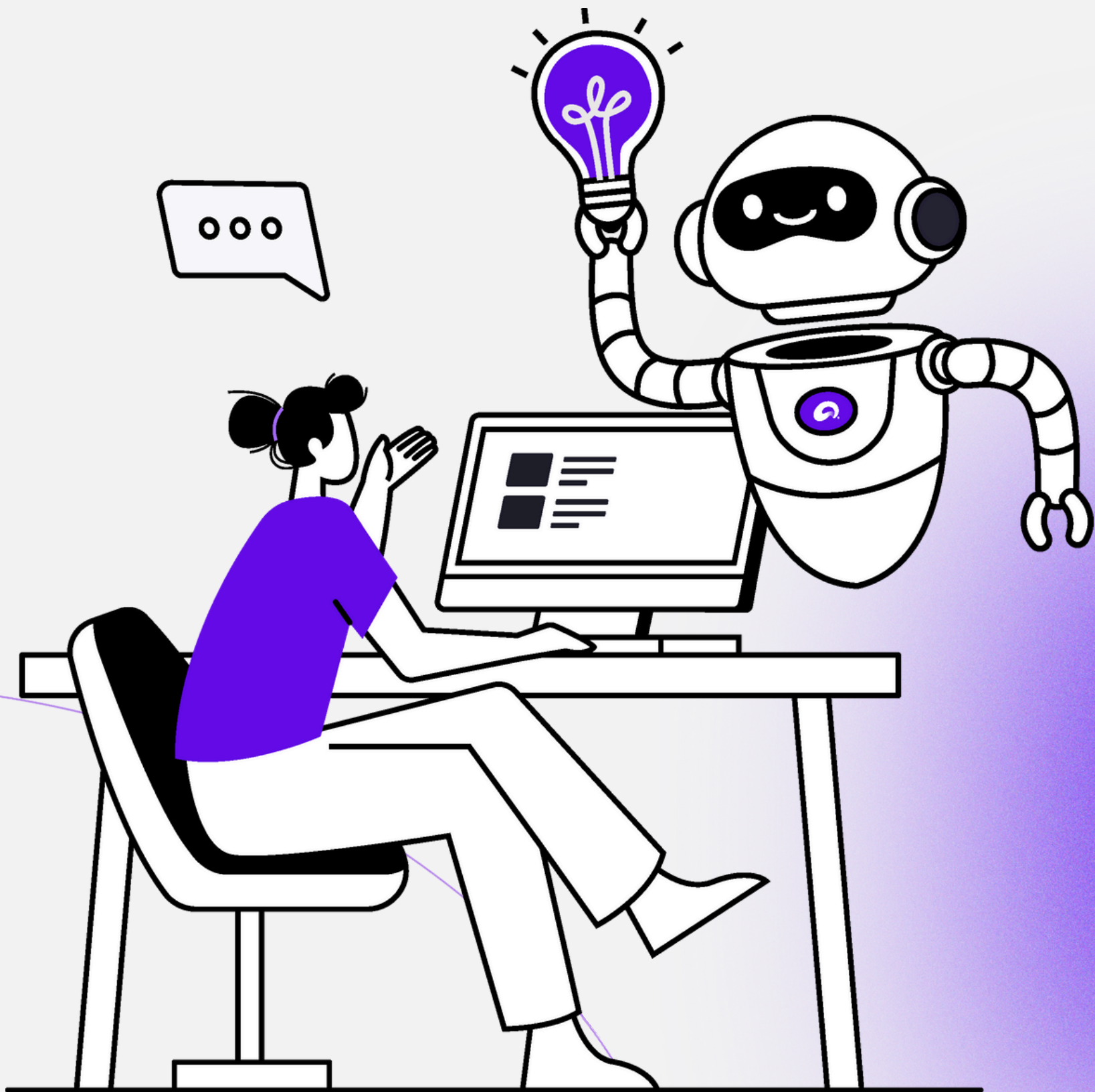


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AI IN CUSTOMER SERVICE:

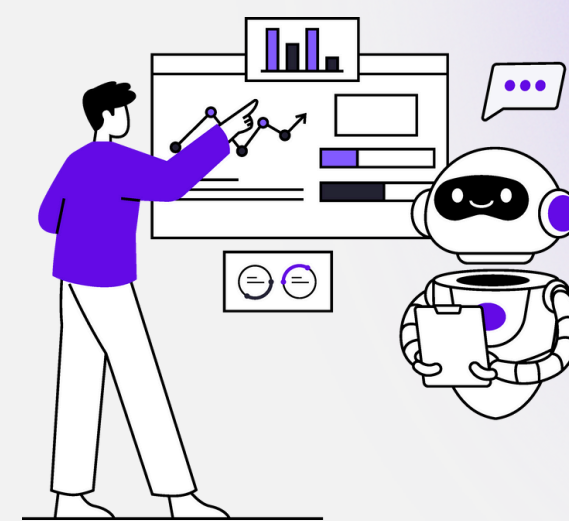
STRATEGIES IN THE AGE OF EXPERIENCE



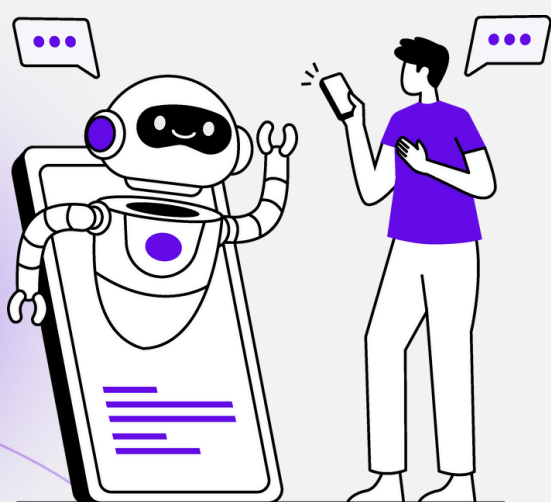
AI IN CUSTOMER SERVICE: STRATEGIES IN THE AGE OF EXPERIENCE

In just a few years, we've experienced a profound transformation in the way people interact with brands, products, and services. Driven by digitalization, the multiplicity of channels, and easy access to price comparison tools, customer expectations have never been higher. Today, people expect agility, personalization, convenience, and, above all, a seamless, frictionless experience at every point of contact with a company.

This shift requires companies to stop treating customer service as a mere operational area and start seeing it as a strategic component of the customer journey. Customer service is increasingly a competitive differentiator.



Good service can build customer loyalty, generate brand advocates, and thus drive growth. On the other hand, a poor experience is enough to drive customers away and tarnish a company's reputation, especially on social media, where everything spreads quickly.



According to Deloitte Digital research, **customers spend up to 37% more with brands that offer personalized experiences.** This demonstrates that, beyond efficiency, personalized service has had a direct impact on revenue.

A recent Zendesk report indicates that consumers, expecting interactions enabled by advanced AI and now familiar with them, can't help but notice the difference in their experiences with brands. Nearly three-quarters (70%) of consumers say there is a clear difference between companies that effectively use AI in customer service and those that don't.

In this scenario, digital transformation in customer relationships is no longer optional but urgent. It's necessary to abandon rigid, manual models that fail to address the complexity of today's world. Companies that want to remain relevant need to be able to offer omnichannel support, understand consumer context, anticipate needs, and proactively resolve problems. And here, we're talking about technology.

APPLYING AI IN CUSTOMER SERVICE:

FROM CONCEPT TO PRACTICE

Before implementing artificial intelligence, it's essential for companies to evaluate some strategic pillars that will ensure the initiative's success. Below are the **main points** that should guide this process:

1

It all starts with a diagnosis of the current operation.

Understanding how customer service works today, where the bottlenecks are, and which steps are most repetitive or critical helps identify real opportunities for applying AI, whether for efficiency gains or improving the customer experience.

2

Next, it's essential to have clarity on objectives.

Technology needs to be used to achieve concrete goals: reducing response time, increasing customer satisfaction, scaling customer service, or automating specific stages of the journey. This direction guides both technical decisions and business priorities.

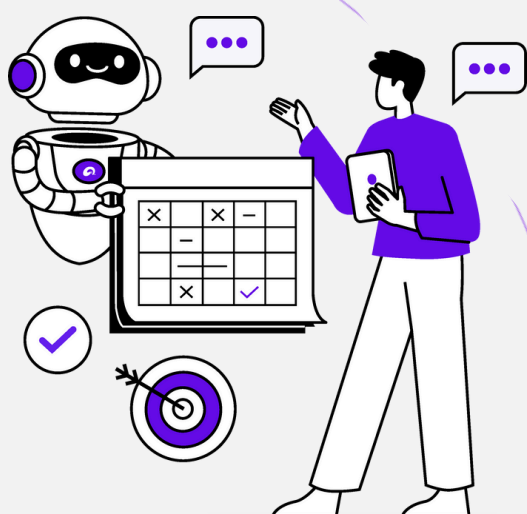
3

Another critical point is data quality.

AI relies on information. Therefore, it's important to ensure that data is organized, up-to-date, accessible, and, ideally, integrated across systems such as CRM, ERP, and channels.

When starting, the recommendation is to have a well-defined and concise scope. Beginning with a pilot, such as a virtual assistant for triage or scheduling, allows you to test in practice, generate quick learnings, and gain internal support with concrete results.

No technology creates impact on its own. Team involvement is decisive. Areas such as customer service, technology, and customer experience must be aligned from the start, ensuring that the solution makes sense for those who operate it and for those who are served.



To guide you from concept to practice, at dhauz we provide at the end of this content a **step-by-step guide to implement AI in customer service.**

Now that we've covered the context and the strategic pillars as a foundation, **we will move on to detailing the best solutions to implement AI in customer service.**

THE TURNING POINT

Far from being a futuristic promise, AI is already a reality in customer service at many market-leading companies, with capabilities such as intelligent chatbots, predictive analytics, segmentation, natural language processing, and recommendation systems.



With AI, it's possible to automate simple interactions, prioritize service based on urgency, understand emotions in conversations, and even predict the reason for contact before the customer even explains it. So much so that 59% of Customer Experience (CX) leaders plan to invest in AI by 2026, according to Zendesk.

Furthermore, Brazilian e-commerce is expected to grow 88% by 2026, representing approximately 12.7% of total retail in Brazil, according to Deloitte data. This scenario highlights the need for agile, efficient, and scalable service, capable of handling growing volumes without compromising quality or significantly increasing costs.

It's also important to note that AI isn't meant to replace the human factor, but to enhance it. The result is a more efficient operation, with faster responses and more relevant experiences.

In this e-book, we'll show why traditional segmentation is no longer enough, how to personalize journeys in real time with contextual data, and how AI can anticipate needs before the customer even expresses them. Learn the difference between chatbots, virtual assistants, and AI agents, and how each contributes to more efficient and intelligent customer service.

We also provide practical examples, success stories, guidance on applying these technologies ethically and strategically, and a step-by-step guide to starting your own journey toward personalized, proactive, and scalable customer service.

MARKETING SEGMENTATION VS. CX

In the world of **Customer Experience (CX)**, segmentation isn't just about understanding who the customer is, but also how they behave, what context they're in, and what they expect at each point in the journey.

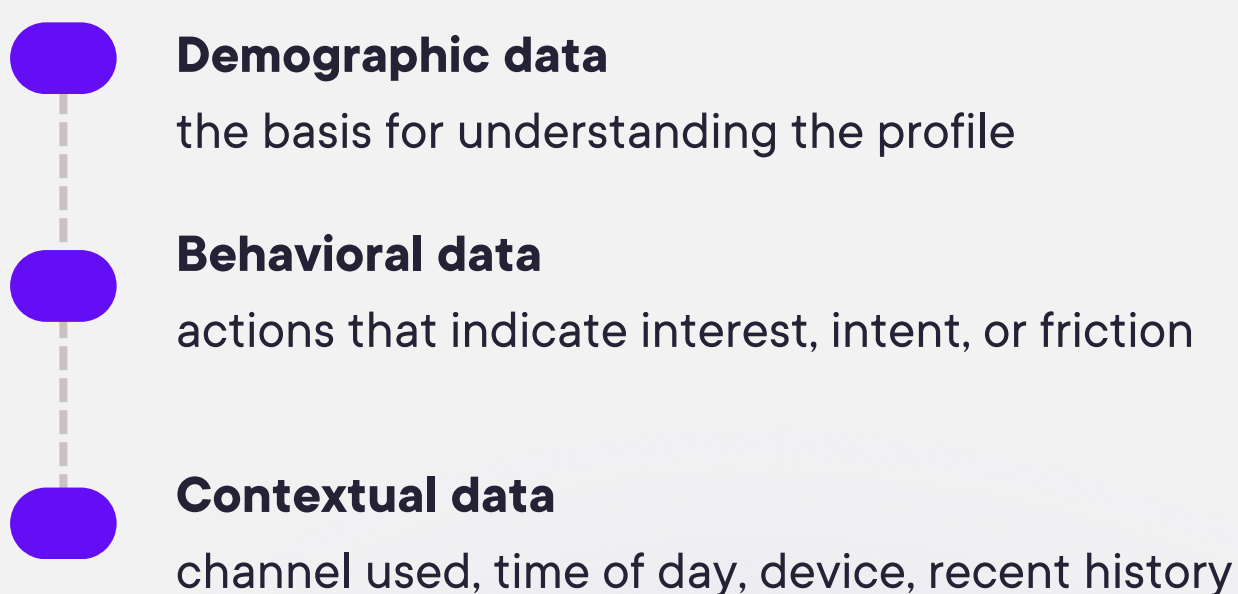
Traditional marketing segmentation is based on factors such as:



These models work well for campaigns, but they aren't sufficient to guide personalized interactions in real time. After all, just because two people have the same demographic profile doesn't mean they experience the same journey or have the same expectations at that moment.

The CX Vision: Live and Contextual Segmentation

In CX, what matters isn't just who the customer is, but also what they're doing right now, what stage of the journey they're at, and how they're feeling. This is where more comprehensive segmentation models come in, combining:



Dynamic Segmentation: The Key to a Proactive and Personalized CX

In practice, this means moving from a fixed model ("customer A belongs to group X") to an adaptive logic ("customer A is now at moment Y, with intention Z").

Dynamic segmentation can enable you to:

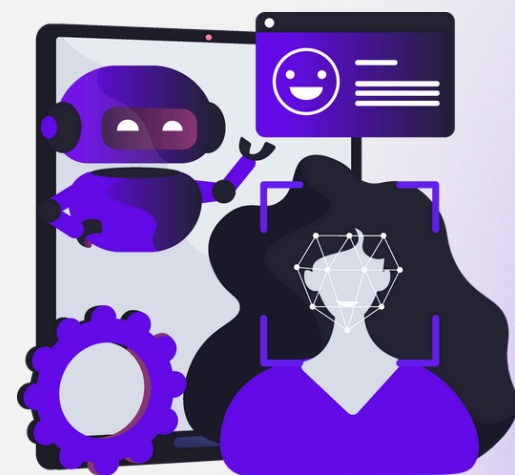
- Detect a customer at high risk of churn and trigger a retention journey
- Recognize repeating frustrating actions and offer proactive help
- Identify customers with repeat purchasing behavior and recommend upgrades or personalized products
- Adapt the tone of voice and communication channel based on history and current context

The more vivid the segmentation, the more relevant the experience.

PERSONALIZATION AT SCALE:

CREATING UNIQUE EXPERIENCES

With artificial intelligence, personalization and scale are no longer opposites; they have become allies in creating smarter, more fluid, and profitable journeys. **Personalization at scale is the bridge between data and experience**, and is transforming the way companies connect with their customers.



Intelligent Recommendations and Adaptive Interactions

AI allows each customer to be treated as an individual, even within a database of thousands (or millions) of people. This happens because algorithms analyze massive volumes of data (historical, behavioral, and contextual) and translate it into personalized decisions in real time.

This makes it possible to:

- Product and service recommendations based on habits, preferences, and consumer behavior.
- Dynamic customer service scripts that adjust to the customer's profile and history, making the conversation more efficient.
- Adapted tone of voice, varying the language according to the channel, the moment in the journey, or the user's communication style.

- Eliminate friction and unnecessary steps by predicting customer behavior and needs.
- Delight with the feeling that "it was made for me"

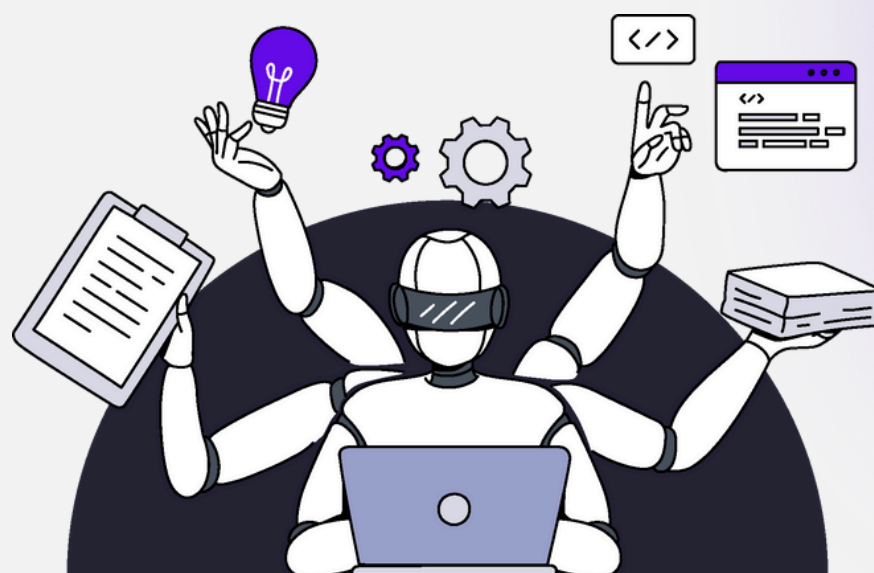
SUCCESS STORY:

In this webinar and article, you will learn about Jetson's case study and understand how data analysis helped the company better understand its audience, increase sales, and guide strategic decisions.



LEARN MORE

Webinar:
How to Start Using My Company's Data?



WATCH WEBINAR

PREDICTIVE AI:

ANTICIPATING NEEDS BEFORE THE QUESTION IS ASKED

We live in an era of hyper-personalization. Customers don't just want to be well-served; they also expect to be understood, remembered, and, if possible, anticipated. This is where predictive artificial intelligence comes in, a technology that transforms data into predictions, and predictions into strategic actions.



More than just answering questions, **predictive AI allows companies to get there first (understanding what customers will need, even before they realize it).**

THE POWER OF HISTORICAL

AND BEHAVIORAL DATA

Every customer interaction leaves traces: past purchases, campaign clicks, support tickets, website visits, reviews, service usage times... This data, when intelligently organized and analyzed, reveals patterns.

Predictive AI uses algorithms to connect these dots and identify signals that anticipate future behavior. It's like looking in the rearview mirror and, with it, gaining foresight into the future.

The larger and more qualified the database, the more accurate the predictions will be. But the difference lies in reading behavior in real time, which allows you to act not only based on history, but also on context.



MORE CONTENT
ON THIS TOPIC:

PREDICTIVE NPS

HOW TO PREDICT INTENTIONS, DEMANDS, AND PROBLEMS

Predictive AI can be applied in the following scenarios:



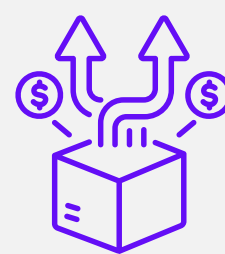
Proactive service

identify customers with a high likelihood of experiencing difficulties and offer help before a ticket is opened.



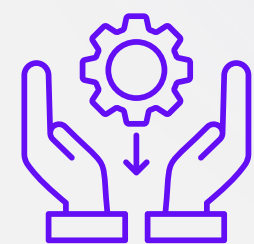
Retention

detect signs of imminent cancellation and trigger engagement campaigns or personalized reactivation offers.



Upsell and cross-sell

suggest complementary products at the ideal time, based on consumer behavior and customer profile.



Effort reduction

remind customers of renewals, anticipate frequently asked questions, or automate processes before they request them.

This information is transformed into intelligent triggers for timely service, marketing, support, or sales actions. They increase the perception of value, reduce friction, and increase conversion, without the customer having to take the first step.

SUCCESS STORY:



Through an analytical model developed with dhauz, Oi can identify causal variables that influence customer satisfaction and, thus, anticipate whether customers might become detractors, improving the quality of its products.

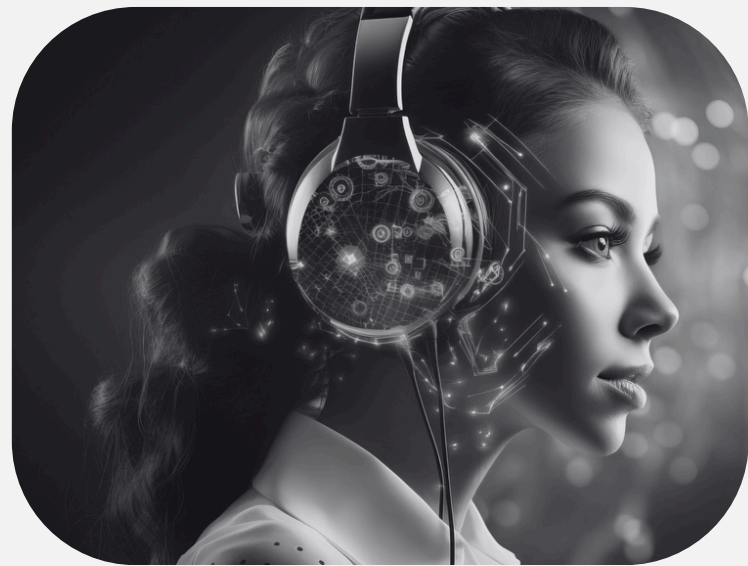
Check out the chat in this success story:

[WATCH EPISODE](#)

FROM CHATBOT TO AI AGENT:

LEVELS OF INTELLIGENCE IN CUSTOMER SERVICE

The use of artificial intelligence in customer service has evolved rapidly, and with it, questions arise about what exactly a chatbot, a virtual assistant, and an AI agent do. Although these terms are often used synonymously, they represent different levels of sophistication and purpose within an experience strategy.



CHATBOT, VIRTUAL ASSISTANT, AND AI AGENT:

WHAT'S THE DIFFERENCE?

Chatbots

are the simplest form of this evolution. They are programmed to follow predefined flows and respond to commands or frequently asked questions. They work well for operational tasks, such as checking a bill or scheduling an appointment. However, they have clear limitations: they don't interpret nuances or adapt the conversation based on context.

Virtual assistants

emerge as an evolution of chatbots. They use natural language processing (NLP) techniques to better understand what the customer means, even if they communicate informally or with errors. They learn from interactions and can adapt the dialogue, making the conversation more fluid and personalized. They are ideal for more complex interactions, which require historical understanding and a more natural journey management.

AI agents

finally, go beyond the conversational interface. They are intelligent systems that operate behind the scenes: they analyze data in real time, recognize behavioral patterns, make autonomous decisions, and coordinate different points in the customer journey. They can, for example, identify a dissatisfied customer based on recent interactions and activate a specific retention action—all in an automated and personalized manner.

These solutions don't compete with each other, but rather complement each other. The chatbot efficiently handles the basics. The assistant steps in when the interaction requires more interpretation. And the AI agent acts as the brain behind it all, ensuring intelligent and coherent decisions throughout the entire journey.

WEBINAR



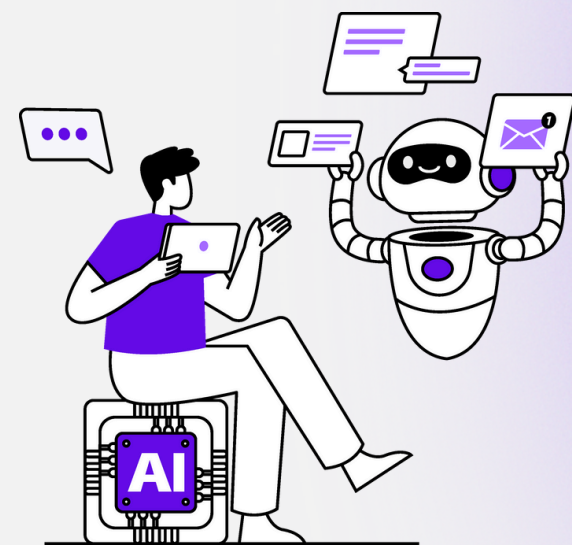
Check out these and many other topics in our **webinar: AI in Customer Service**

[WATCH WEBINAR](#)

THE FOUNDATION FOR

REAL CONVERSATIONAL EXPERIENCES

More than answering questions, AI in customer service needs to create purposeful conversations. This means understanding context, adapting language to the customer's profile, anticipating needs, and knowing when to escalate to a human agent. The goal isn't to appear human, but to resolve issues with intelligence, empathy, and fluidity.



To achieve this, it's essential that the company has quality data, system integration, and clear objectives. An intelligent bot only works well when it's connected to the company's ecosystem and continuously evolves based on learning from interactions.

WHAT'S THE BEST SOLUTION

TO IMPLEMENT IN CUSTOMER SERVICE?

Chatbots

Initial support and triage: to direct the customer to the correct channel or professional

After-hours support: providing quick and up-to-date responses

Operational and repetitive routines: such as balance checks, issuing invoices, scheduling, and order status

Virtual assistants

Personalized interactions: use CRM data, purchase history, and preferences to suggest products, resolve questions, or guide processes uniquely for each customer.

Intelligent multichannel: they monitor the customer across websites, apps, social media, and voice, maintaining context and conversation history regardless of the chosen channel.

Workflow automation: triggers internal tasks (such as opening a ticket or triggering an SLA) without human intervention, accelerating processes that previously depended on multiple systems or teams.

Proactive assistance: based on predefined triggers (cart abandonment, overdue payments, renewal deadlines), takes the initiative to send reminders, offers, or alerts even before the customer requests help.

AI Agents

Tailored Service: When identifying that a customer has already gone through multiple channels without a solution, the agent offers proactive and direct help, without repeating questions.

Predictive Journeys: Based on previous actions, the agent suggests the ideal next step (such as rescheduling a service, renewing a plan, or testing a new feature).

Emotionally Intelligent Support: When sensing frustration in a message, the agent adapts their message to be more empathetic and direct.

Ongoing Relationships: AI learns from each interaction and improves its decisions, maintaining a history that truly enriches the relationship over time.

These experiences, when executed well, not only solve problems but also build connection and loyalty.

INTERPRETING FEEDBACK WITH AI:

FROM NPS TO ACTION

Another fundamental role of AI is to interpret feedback, especially qualitative feedback, such as comments left after an NPS (Net Promoter Score) survey.

AI agents can play an important role by:

- Automatically classifying expressed sentiment (positive, neutral, negative)
- Identifying recurring themes or opportunities for improvement
- Correlating NPS with journey data (e.g., did detracting customers experience more friction at a given stage?)
- Generating actionable insights for product, service, marketing, and operations

Instead of treating NPS as a standalone metric, AI transforms feedback into continuous, personalized learning.

MORE CONTENT ON THE TOPIC:



This chat discusses how AI enables companies to better understand customer preferences, accurately segment audiences, and deliver personalized experiences based on data, increasing engagement and loyalty.

[WATCH EPISODE](#)

ETHICS IN THE USE OF CUSTOMER DATA

Companies have at their disposal a huge amount of data: purchasing habits, online behavior, location, preferences, and even feelings expressed in interactions. With this, technology makes it possible to create incredibly personalized experiences.



But there is a fine line between useful and invasive. The ethical use of data requires transparency, consent, and a clear purpose. The customer needs to know: what data is being collected, what it will be used for, and how this collection will bring direct benefits to them.

Ethical and regulatory principles in digital transformation

In addition to best practices, digital transformation in customer service must be aligned with ethical principles and legal standards, such as the General Data Protection Law (LGPD) in Brazil. Some key principles that should guide the use of data are:

In the application of artificial intelligence, other important ethical concerns arise:

Data security: AI models need to be trained and operated with robust protocols to protect sensitive information from leaks or unauthorized access.

Algorithmic biases: if the data used to train a model is biased — representing certain groups inappropriately, for example — the system may end up making unfair, discriminatory, or inaccurate decisions.

- **Customer autonomy:** AI should never eliminate freedom of choice, but rather expand it with useful and contextualized recommendations.

These principles form the foundation for building sustainable, reliable, and customer-centric digital experiences.

MORE CONTENT ON THE TOPIC:

Check out the first episode of podhauz, which brings a conversation about best practices already implemented in the industry, and the guidelines related to the ethical use of artificial intelligence incorporated into the healthcare sector.

[WATCH EPISODE](#)



This article offers a critical reflection on racial biases present in artificial intelligence, highlighting cases such as those shown in the documentary Coded Bias. It demonstrates how algorithms can reproduce historical inequalities if trained with biased data — reinforcing the urgency for inclusive and fair regulation of technologies.

THE FUTURE OF CUSTOMER SERVICE

It is clear that companies that do not adopt AI now risk losing competitiveness.

Increasing digitalization demands immediate scalability; consumers want more personalization, and data confirms that companies investing in AI are already seeing gains both in customer satisfaction and in revenue. Moreover, the adoption of generative AI can increase customer service team productivity by up to 45%, according to a McKinsey study.

This powerful combination sets a new standard: customer service will no longer be just an operational function but will become a strategic asset. AI enables this leap, allowing companies to offer personalized experiences at scale, reduce operational costs, and still provide faster and more effective support.



On the other hand, leaders also recognize the risks. There are challenges such as customer distrust of AI agents, privacy concerns, and resistance to technological change.

The moment for transforming customer service has arrived. Companies that plan and implement AI solutions strategically will stand out in the market, delivering real value to clients and ensuring sustainable competitive advantage. The future of customer service lies in efficiency, personalization, and intelligence — and this change is already happening today.

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Digital engagement in the consumer industry

What is personalization in customer experience

Deloitte Digital report

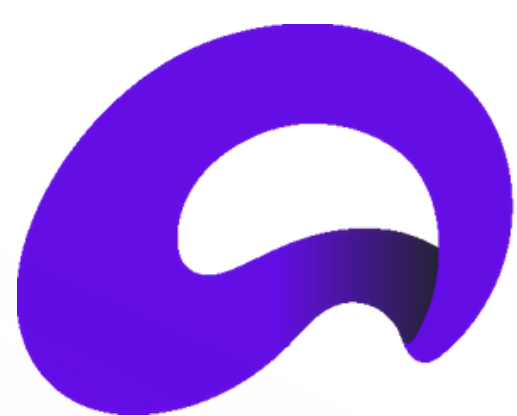
The economic potential of generative AI

APPLYING AI IN CUSTOMER SERVICE:

FROM CONCEPT TO PRACTICE

A practical roadmap to get started with safety and purpose:

- 1 Map the customer's current journey**
– identify pain points and answer questions such as:
 - What are the main bottlenecks in today's journey?
 - Where is there rework, failures, or dissatisfaction?
 - How much time do agents spend on repetitive tasks?
- 2 Choose a priority challenge to solve with AI**
(e.g., high customer service volume for simple requests).
- 3 Define goals and success indicators, such as:**
 - Reducing average response time;
 - Increasing resolution rates on the first contact;
 - Personalizing messages and communication;
 - Reducing call volume and manual contacts;
 - Improving customer experience and increasing NPS.
- 4 Choose the right AI technology for the challenge, such as:**
 - Chatbot;
 - Virtual Assistant;
 - Voice Agent;
 - Sentiment Analysis;
 - Journey personalization (segmentation, predictive AI).
- 5 Organize available data and integrate the systems that will feed the AI.**
 - Structured and accessible data sources (CRM, tickets, logs, surveys, feedback).
- 6 Engage teams** in adopting and testing the AI solution.
- 7** Implement on a small scale (pilot) and adjust as needed.
- 8** Adjust, learn, and expand gradually, based on real business results.
- 9** Continuously monitor performance and refine AI models with real feedback.
- 10** Communicate and share learnings internally.



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