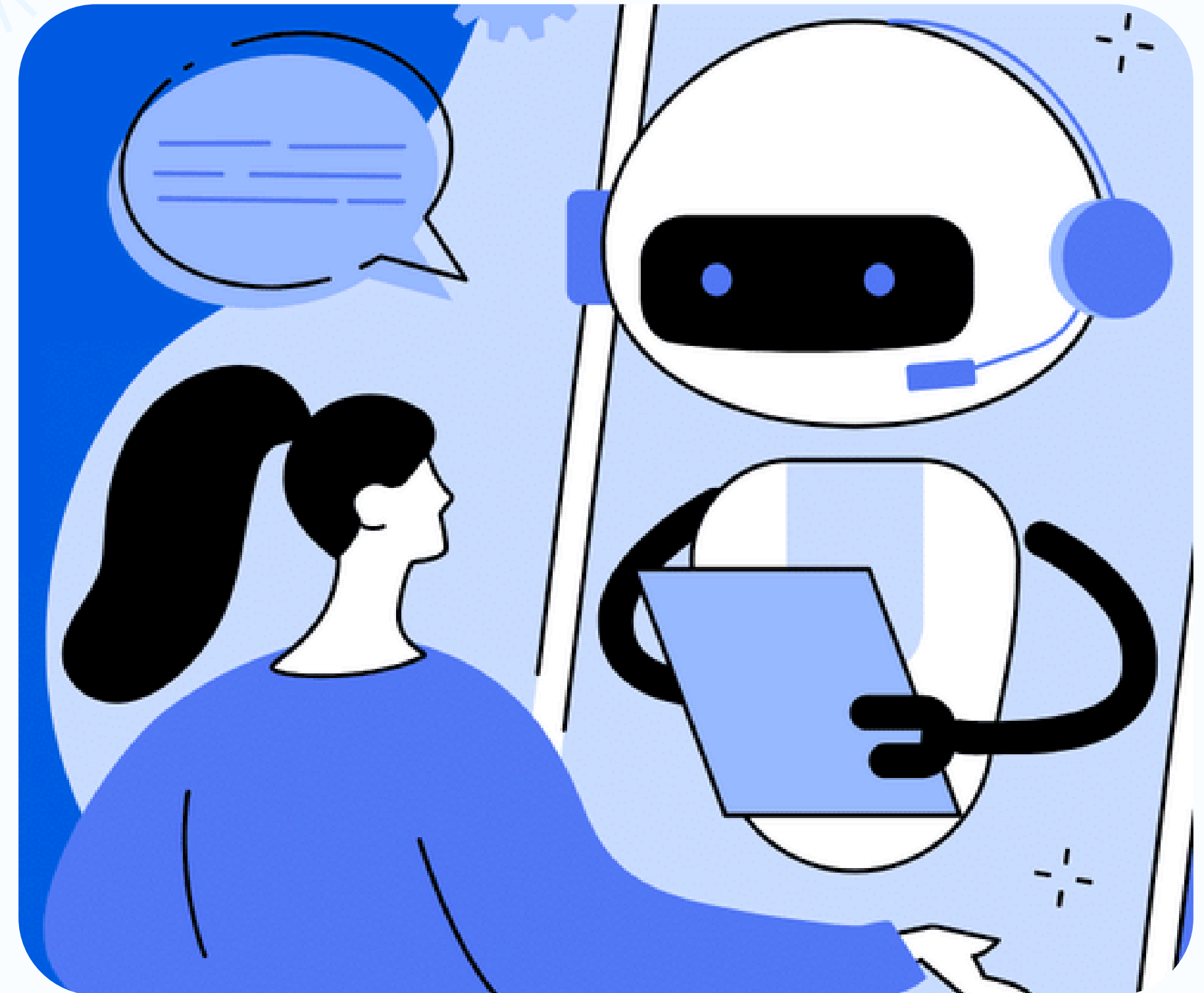


CASE-STUDY ANALYSING


AI IN CUSTOMER SUPPORT AUTOMATION


LEARN IN PUBLIC CHALLENGE (1/5)

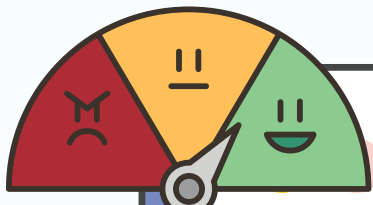


MARKET OVERVIEW

The global customer support market—spanning software, services (BPO), and automation—is estimated at **\$470–500 billion** in 2024. 

India is a global leader in customer support services, particularly in outsourcing and BPO. In 2023, the Indian CX BPO market was valued at **\$4.4 billion**, and is expected to reach **\$12 billion** by 2030—growing at a **15.5% CAGR**. 

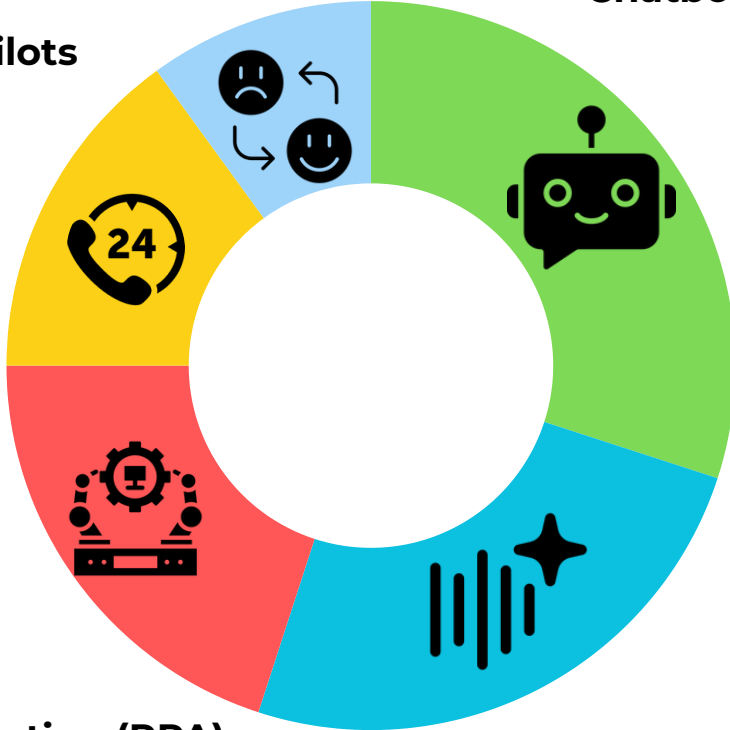




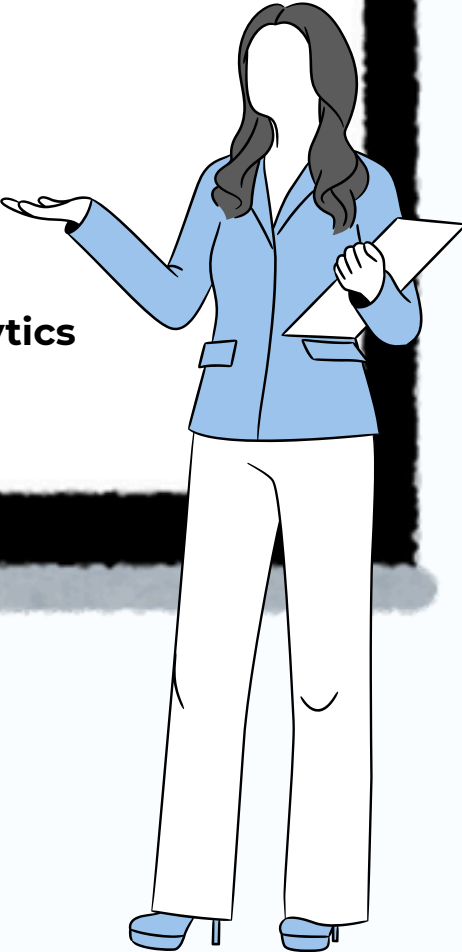
PROJECTED GROWTH


- The global customer support market is Expected to grow to **\$800+ billion** by 2035, at a **CAGR of ~5%**.
- India’s broader IT-BPM sector (includes support, tech services) is worth over **\$250 billion**, employing **5.4 million+ people**.

KEY SUB-SEGMENTS



Sub-Segment	Percentage
Chatbot & Virtual assistants	30%
AI Voice Agents & Voice Analytics	25%
Ticketing & Workflow Automation (RPA)	20%
Agent Assistance / Co-pilots	15%
Sentiment & Emotion Analytics	10%





GROWTH DRIVERS

- Digital transformation, Omnichannel demand
- AI and virtual agents, Cost efficiency, Customer expectations

JOBS TO BE DONE

Sub - segment chosen - AI Voice + Chat Assistant

WORKFLOW

1. ENTRY

Instantly engage users across channels without wait times or added agent load.



2. PERSONALIZATION

Deliver relevant, personalized support using past data to boost resolution and trust.



3. AUTOMATION

Automate routine queries to speed up answers for users and reduce agent effort.



6. INSIGHTS

Learn from every interaction to improve agent workflows and future user experiences.



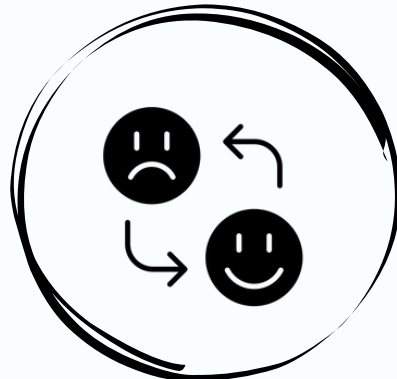
5. ESCALATION

Ensure seamless handoff to humans when needed to maintain satisfaction and efficiency.



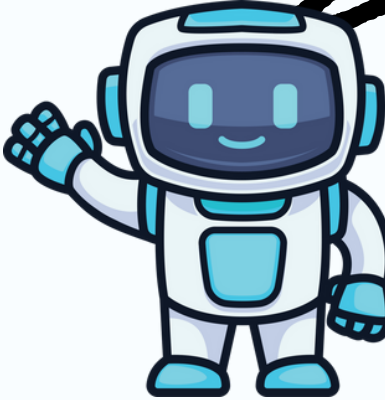
4. SENTIMENT

Detect emotional cues to respond empathetically and trigger smart escalations.



WHY JTBD MATTERS FOR THIS SUB-SEGMENT

- Ensures Product-Market Fit
- Aligns Cross-Functional Teams
- Drives Adoption and Retention
- Helps Prioritize Features
- Foundation for Differentiation



CHALLENGES

- Inaccurate Understanding of User Intent
- Data Privacy & Integration Complexity
- Robotic & Impersonal User Experience

KEY INDUSTRY PLAYERS






TECH-GIANTS


SPECIALIZED VOICE AI LEADERS






valued at ~\$500 M





~160 M interactions/month



Companies that adopt AI in support report up to **30–40%** reduction in churn and **20–25%** increase in CSAT/NPS scores.



EMOTION & ANALYTICS STARTUPS



KEY VALUE PROPOSITION PARAMETERS

Accuracy & Naturalness

Omni-Channel Coverage

Scalability & Cost Efficiency

Agent Co-pilot Features

Emotion / Sentiment Analytics

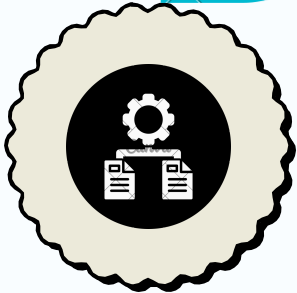
Compliance & Privacy

RECENT TRENDS

2 2018–2020: NLP-Powered Bots

- Introduction of machine learning and NLP
- Better intent recognition, multi-language support, and fallback handling.

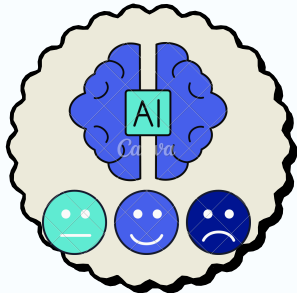
Impact: Helped scale support without expanding teams.



4 2021–2023: Sentiment & Emotion AI

- Emotion recognition tools like Cogito, Affectiva, and Beyond Verbal gained traction.
- Real-time mood analysis to trigger escalation or adjust tone.

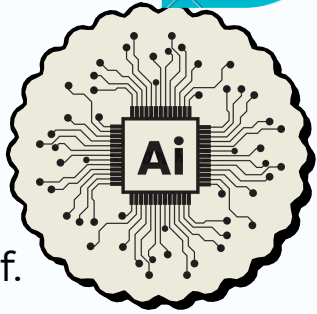
Significance: Started humanizing AI interactions.



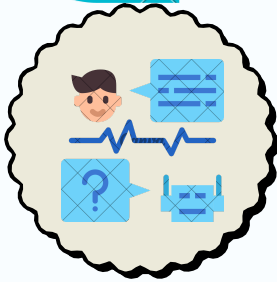
6 2024-current: Multimodal & Hyper-Personal AI

- Unified bots handling text, voice, emotion, and CRM context in real time.
- Personalized support flows based on behavior, intent, and preferences.

Trend: Full-stack automation with context + emotion + human handoff.



1 Pre-2018: Rule-Based Chatbots



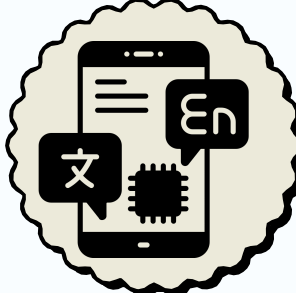
- Early bots were decision trees with scripted replies.
- Limitation:** Couldn't handle context shifts, slang, or unexpected inputs.

3 2020–2022: Voice AI & Conversational Interfaces



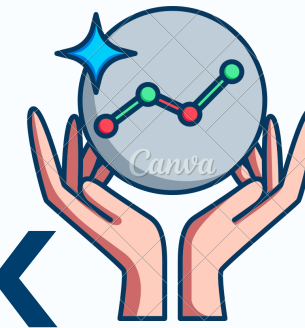
- Rise of voice bots like **PolyAI**, **Uniphore**, and **Amazon Lex**.
 - Enabled conversational IVRs, voice assistants in apps, and phone-based support.
- Trend:** Voice-first support became key in travel, banking, and healthcare.

5 2023-2024: LLM-Based Assistants & Co-Pilots



- Launch of GPT-powered copilots.
 - Bots became capable of nuanced, multi-turn conversations.
- Shift:** From automation to AI-augmented human support.

FUTURE OUTLOOK



Generative AI Will Power Fully Dynamic Conversations

- Large Language Models (LLMs) like GPT and Claude will enable human-like, unscripted support interactions.

Outcome: Bots will handle 80–90% of Tier 1 and Tier 2 queries without fallback.

Personalized & Predictive Support Will Become the Norm

- AI will proactively detect issues before customers even reach out (e.g., “Your refund is delayed, here's what we did”).

Outcome: Frictionless, self-healing support experiences.

How do I envision the market evolving?



Support Will Become a Core Revenue Channel

- AI will turn support from a cost center into a revenue driver—surfacing offers, renewals, upsells, and retention triggers during conversations.

Outcome: Businesses will invest more in support AI than ever before.

Human-AI Collaboration Will Be the Standard

- Instead of replacing agents, AI copilots will augment every human touchpoint:
 - Auto-summarizing tickets
 - Recommending next best actions
 - Real-time coaching during live calls



Outcome: Agents will become superpowered advisors, not query solvers.

DIFFERENTIATION FACTORS FOR NEW ENTRANT GROWING IN THIS MARKET



If I were to launch a product in the **AI Voice + Chat space**, I'd bet on **BFSI**(Banking, Financial Service and Insurance)–**focused SMEs** — and here's why:

Problem:

BFSI SMEs face high support volumes, low automation, and lack emotionally responsive, compliant systems.

Opportunity:

The BFSI contact center analytics market is projected to grow from US **\$3.17B** in 2024 to **\$8.23B** by 2034, at a **CAGR** of **~10%** — driven by demand for scalable, voice and chat support combined with compliance and CX optimization.

Solution:

A plug-and-play AI Voice + Chat Agent with emotion detection, CRM integration, and BFSI-ready workflows.

Impact:

Reduces manual load, boosts agent productivity, ensures compliance, and delivers faster, empathetic customer service.

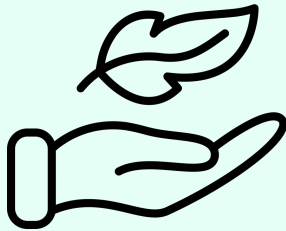
CX IMPACT

Hyper-Contextual Understanding



Strategic Value: Incumbents often offer generic bots — deep vertical context is a moat.

Plug-and-Play Integrations with Lightweight Setup



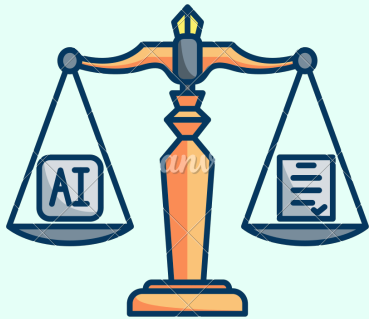
Strategic Value: Enterprise buyers hate long integration cycles. Simplicity is a competitive edge.

Cross-Channel Voice Continuity



Strategic Value: Delivers seamless omnichannel support.

Transparent & Ethical Voice AI



Strategic Value: Enterprise buyers increasingly care about compliance + explainability in AI.

AI Maturity