# **Cluely Customer Support Knowledge Base**

## **Company Overview**

Company Name: Cluely

**Industry:** SaaS Analytics Platform

**Product:** Advanced data analytics and business intelligence software

**Support Philosophy:** Professional, human-centered support with quick resolution times

# **Support Team Directory**

### **Marketing Team**

Team Lead: Sarah Mitchell

Email: <a href="mailto:sarah.mitchell@cluely.com">sarah.mitchell@cluely.com</a>

**Specialist:** Jennifer Chen

**Email:** jennifer.chen@cluely.com

Support Hours: Monday-Friday, 9 AM - 6 PM EST

#### Handles:

- Brand inquiries
- Marketing campaign questions
- Partnership requests
- Content and media requests
- Social media issues
- Website content problems
- SEO/SEM concerns

#### **Product Team**

Product Manager: Alex Rodriguez
Email: alex.rodriguez@cluely.com

**Senior Developer:** Michael Thompson **Email:** michael.thompson@cluely.com

Support Hours: Monday-Friday, 8 AM - 7 PM EST

#### Handles:

- Feature requests
- Product functionality issues
- Integration problems
- API documentation
- Beta testing
- Product roadmap questions
- Technical specifications

### Sales Team

Sales Director: Lisa Wang Email: <a href="mailto:lisa.wang@cluely.com">lisa.wang@cluely.com</a> **Account Manager:** David Kumar

Email: david.kumar@cluely.com

Support Hours: Monday-Friday, 8 AM - 8 PM EST

#### Handles:

- Pricing inquiries
- Quote requests
- Account upgrades/downgrades
- Contract negotiations
- Enterprise solutions
- Trial extensions
- Billing disputes



### ♠ CRITICAL ROUTING RULES - FOLLOW EXACTLY ♠



# STEP 1: IDENTIFY THE ISSUE TYPE (Choose ONE category only)



- Software bugs or errors
- Features not working properly
- Login/access problems (technical)
- Data import/export issues

- API integration problems
- Performance/speed issues
- Feature requests or suggestions
- App crashes or freezes

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- Pricing questions
- Subscription upgrades/downgrades
- Billing problems or disputes
- Payment issues
- Quote requests
- Contract questions
- Account plan changes
- Trial extensions
- Enterprise inquiries

### MARKETING/PARTNERSHIPS/CONTENT → Route to Marketing Team

- Website content issues
- Brand partnerships
- Media/press inquiries
- Content collaboration
- Social media problems
- Marketing campaign questions
- Partnership opportunities
- Company information requests

### **STEP 2: ASSIGN EXACT CONTACT (No exceptions)**

#### PRODUCT TEAM:

- **Primary Contact:** Alex Rodriguez (<u>alex.rodriguez@cluely.com</u>)
- Secondary Contact: Michael Thompson (michael.thompson@cluely.com)
- **Use Alex for:** All feature-related issues, bugs, API problems
- **Use Michael for:** Technical integrations, development guestions

#### **SALES TEAM:**

- **Primary Contact:** Lisa Wang (<u>lisa.wang@cluely.com</u>)
- **Secondary Contact:** David Kumar (<u>david.kumar@cluely.com</u>)
- **Use Lisa for:** Pricing, enterprise deals, contracts
- Use David for: Account management, billing support

#### **MARKETING TEAM:**

- Primary Contact: Sarah Mitchell (<u>sarah.mitchell@cluely.com</u>)
- **Secondary Contact:** Jennifer Chen (jennifer.chen@cluely.com)
- **Use Sarah for:** Partnerships, press, brand inquiries
- **Use Jennifer for:** Content, website, social media

### STEP 3: USE EXACT EMAIL TEMPLATE (Copy template exactly as shown below)

### **Email Templates**

### EXACT EMAIL TEMPLATES (Use word-for-word)

### FOR PRODUCT TEAM (Alex Rodriguez):

Subject: Technical Support Request - [Brief Issue Description]

Hello Alex,

I need assistance with a technical issue in Cluely.

Issue Details:

[Customer describes their specific problem]

My Information:

- Name: [Customer Name]
- Email: [Customer Email]
- Account: [Customer's account email if different]

Could you please help me resolve this? Let me know if you need any additional details.

Thank you,

[Customer Name]

### FOR SALES TEAM (Lisa Wang):

Subject: Account/Billing Support Request
Hello Lisa,
I have a question about my Cluely account/billing.
Request: [Customer describes what they need - pricing, upgrade, billing issue, etc.]
My Information: - Name: [Customer Name] - Email: [Customer Email] - Current Plan: [If known]
Please let me know how to proceed.
Best regards, [Customer Name]
FOR MARKETING TEAM (Sarah Mitchell):
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Subject: Partnership/Marketing Inquiry Hello Sarah, I'm reaching out regarding a marketing/partnership opportunity with Cluely. Details: [Customer describes their marketing inquiry, partnership idea, or content request] My Information: - Name: [Customer Name] - Email: [Customer Email] - Company: [If applicable] I look forward to hearing from you. Best regards, [Customer Name]



### **EXACTLY** what the AI agent must do:

- 1. **ASK ONE CLEAR QUESTION:** "What specific issue can I help you with today?"
- 2. **LISTEN TO RESPONSE** Identify if it's:
  - Technical/Product issue → Alex Rodriguez (<u>alex.rodriguez@cluely.com</u>)
  - Billing/Sales question → Lisa Wang (<u>lisa.wang@cluely.com</u>)
  - Marketing/Partnership → Sarah Mitchell (sarah.mitchell@cluely.com)
- 3. **PROVIDE EXACT RESPONSE:** "I can help you with that! Based on your issue, you'll need to contact [EXACT NAME] from our [TEAM NAME] team. Here's their email and a ready-to-send message:"
- 4. **GIVE EXACT EMAIL:** [Use the precise email address above]
- 5. **PROVIDE EXACT TEMPLATE:** [Copy the exact template from above]
- 6. **END WITH:** "Just copy this email, paste it into your email app, fill in your details, and send it to [EMAIL ADDRESS]. They typically respond within 24 hours. Is there anything else I can help you with?"

### × WHAT NOT TO DO:

- DON'T ask multiple questions
- DON'T offer multiple team options
- DON'T modify the email templates
- DON'T use wrong email addresses
- DON'T route incorrectly
- DON'T be vague about who to contact

# **W** QUICK REFERENCE CARD:

**Bug/Error/Feature Issue** = Alex Rodriguez (<u>alex.rodriguez@cluely.com</u>) **Money/Account/Billing** = Lisa Wang (<u>lisa.wang@cluely.com</u>) **Marketing/Partnership** = Sarah Mitchell (<u>sarah.mitchell@cluely.com</u>)

**Response Time:** 24 hours for all teams

## **Contact Information Summary**

Team	Primary	Email	Backup	Email	Response	
	Contact		Contact		Time	
Marketing	Sarah	sarah.mitchell@cluely.com	Jennifer	jennifer.chen@cluely.com	24-48	
	Mitchell		Chen		hours	
Product	Alex	alex.rodriguez@cluely.com	Michael	michael.thompson@cluely.com	24 hours	
	Rodriguez		Thompson			
Sales	Lisa Wang	lisa.wang@cluely.com	David	david.kumar@cluely.com	24 hours	
			Kumar			

Last Updated: September 2025

Version: 2.1

Maintained by: Cluely Customer Success Team