Demo Script & Knowledge Base Content

Demo Call Script

Scenario: CloudSync Software Support Call

Context: Customer having issues with password reset and account access

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Call Dialog

Agent (Opening)

"Hello, this is Mike from CloudSync support. How can I help you today?"

Customer (Initial Problem)

"Hi Mike, I'm locked out of my account. I tried to reset my password multiple times, but I'm not receiving the reset email. This is really frustrating."

💡 Expected AI Suggestion:

[Trigger Phrase: "locked out... not receiving reset email"]
Suggestion Card:
Title: Password Reset Issue - Email Delivery
Content:
- Ask customer to check spam/junk folder first
- Verify email address on file is correct
- Use calm, empathetic tone: "I understand how frustrating this is"

Agent (Following AI Suggestion)

"I understand how frustrating that must be. Let me help you get back into your account right away. First, can you check your spam or junk folder? Sometimes our emails end up there."

Customer (Providing Details)

"I already checked spam. Nothing there. My email is john.smith@techcorp.com - that should be correct."

💡 Expected AI Suggestion:

Agent (Technical Response)

"Let me verify that email address in our system. I see john.smith@techcorp.com is correct. Sometimes corporate email systems block external emails. I can do a manual password reset for you right now over the phone."

Customer (Escalation)

"This is the third time this month I've had login issues. I'm the IT manager at TechCorp, and my team relies on CloudSync daily. We're considering switching to your competitor if these problems continue."

💡 **Expected AI Suggestion:**

Agent (De-escalation Response)

"I sincerely apologize for the repeated login issues. That's absolutely not the experience we want for you or your team. Let me escalate this to our technical team for a permanent fix and discuss some service credits for the inconvenience."

Customer (Billing Concern)

"While we're talking, I noticed our bill increased from $500 to $750 last month. Nobody told us about a price increase."

💡 **Expected AI Suggestion:**

Agent (Billing Resolution)

"Let me check your account details. I can see you added 15 new users last month, which moved you from the Standard to Professional tier. That explains the price increase. I can schedule a billing review to optimize your plan."

Customer (Acceptance)

"Oh, that makes sense. Yes, we did hire more people. Can you help me understand the different tiers so we choose the right one?"

💡 Expected AI Suggestion:

Agent (Consultation)

"Absolutely! For your team size, I'd recommend our Professional plan which includes advanced security features. I can also set up a call with our solutions specialist to review if our Enterprise plan might offer better value."

Customer (Resolution)

"That sounds good. So you'll fix my password issue, look into the login problems, and schedule a billing review?"

Agent (Confirmation)

"Exactly! I've reset your password - it's CloudSync2024! - created a priority ticket for our technical team, and I'll email you about the billing consultation. You should be able to log in right now."

Customer (Satisfaction)

"Perfect! Thanks for actually solving my problems, Mike."

Agent (Closing)

"You're very welcome! I'll personally follow up on that technical ticket. Have a great day!"

RAG Knowledge Base Content

Password Reset Procedures

Common Password Reset Issues:

- Email delivery problems account for 60% of password reset failures
- Corporate email systems often block automated emails from external domains
- Users frequently forget to check spam/junk folders
- Password reset links expire after 24 hours

Troubleshooting Steps:

1. Verify email address spelling and domain
2. Check spam/junk folders
3. Confirm corporate email security settings
4. Offer manual password reset via phone verification
5. For repeated issues, escalate to technical team

Manual Password Reset Process:

- Verify customer identity with account information
- Generate temporary password: Format CloudSync + current year + !
- Customer must change password on first login
- Document manual reset in customer support ticket

Account Access Issues

Common Login Problems:

- Browser cache and cookies cause 40% of login failures
- Two-factor authentication setup issues
- Account lockouts after multiple failed attempts
- VPN and firewall blocking connections

Resolution Steps:

1. Clear browser cache and cookies

2. Try incognito/private browsing mode

3. Check firewall and VPN settings

4. Verify two-factor authentication setup

5. Temporary account unlock for legitimate users

Billing and Pricing Information

CloudSync Pricing Tiers:

- **Starter Plan**: $10/user/month - Up to 10 users, basic features

- **Standard Plan**: $25/user/month - Up to 50 users, advanced reporting

- **Professional Plan**: $35/user/month - Up to 200 users, security features

- **Enterprise Plan**: Custom pricing - Unlimited users, dedicated support

Billing Policy:

- Monthly billing on the 1st of each month

- Pro-rated charges for mid-month user additions

- Automatic tier upgrades based on user count

- 30-day advance notice for price changes

- Service credits available for downtime over 99.5% SLA

Price Change Scenarios:

- User count increases trigger automatic tier upgrades

- Annual plan renewals may include price adjustments

- Feature additions require plan upgrades

- Enterprise customers receive 30-day price change notice

Customer Retention Strategies

Escalation Indicators:

- Mentions of competitors or switching services

- Repeated issues within short timeframe

- Threats to cancel subscription

- Expressions of significant frustration

Retention Responses:

1. Acknowledge problems and apologize sincerely

2. Take immediate ownership of issues

3. Offer concrete solutions with timelines

4. Provide service credits for inconvenience

5. Escalate to technical team for permanent fixes

6. Schedule follow-up calls to ensure resolution

Service Credit Guidelines:

- Up to 50% credit for service disruptions

- Full month credit for repeated critical issues

- Proactive credits for high-value customers

- Document all credits in customer account

Technical Support Escalation

Priority Levels:

- **P1 Critical**: System down, security breach, data loss

- **P2 High**: Major feature broken, multiple users affected

- **P3 Medium**: Single user issues, minor bugs

- **P4 Low**: Feature requests, general questions

Escalation Triggers:

- Customer mentions business impact

- Repeated calls on same issue

- Technical complexity beyond first-level support

- Customer requests manager or specialist

Response Times:

- P1 Critical: 1 hour response, 4 hour resolution

- P2 High: 4 hour response, 24 hour resolution

- P3 Medium: 24 hour response, 72 hour resolution

- P4 Low: 72 hour response, 1 week resolution

Common Customer Pain Points

Email Integration Issues:

- Outlook compatibility problems with newer versions

- Gmail security settings blocking connections
- Corporate email policies preventing third-party access
- IMAP/SMTP configuration errors

Performance Concerns:

- Slow loading times during peak hours
- File sync delays with large documents
- Mobile app crashes on older devices
- Browser compatibility issues

Security Questions:

- Data encryption standards and compliance
- Two-factor authentication setup
- Password policy requirements
- GDPR and data privacy compliance

Competitive Analysis

Main Competitors:

- **SyncPro**: Lower price but limited features
- **CloudMaster**: Similar features but poor support
- **DataSync**: Enterprise focus, higher complexity

Our Advantages:

- Better customer support response times
- More intuitive user interface
- Competitive pricing with flexible tiers
- Regular feature updates and improvements

Retention Talking Points:

- 99.9% uptime SLA vs competitor's 99.5%
- 24/7 customer support vs business hours only
- Free data migration assistance
- No long-term contracts required

Communication Guidelines

Tone and Language:

- Use empathetic language: "I understand how frustrating this is"

- Avoid technical jargon with non-technical customers

- Acknowledge customer emotions before providing solutions

- Use positive language: "I can help you with that" vs "You can't do that"

De-escalation Phrases:

- "I completely understand your frustration"

- "Let me take care of this for you right now"

- "I'm going to make sure this gets resolved"

- "I appreciate your patience while we work through this"

Professional Closings:

- Summarize actions taken and next steps

- Provide ticket numbers for follow-up

- Offer additional assistance

- Thank customer for their business