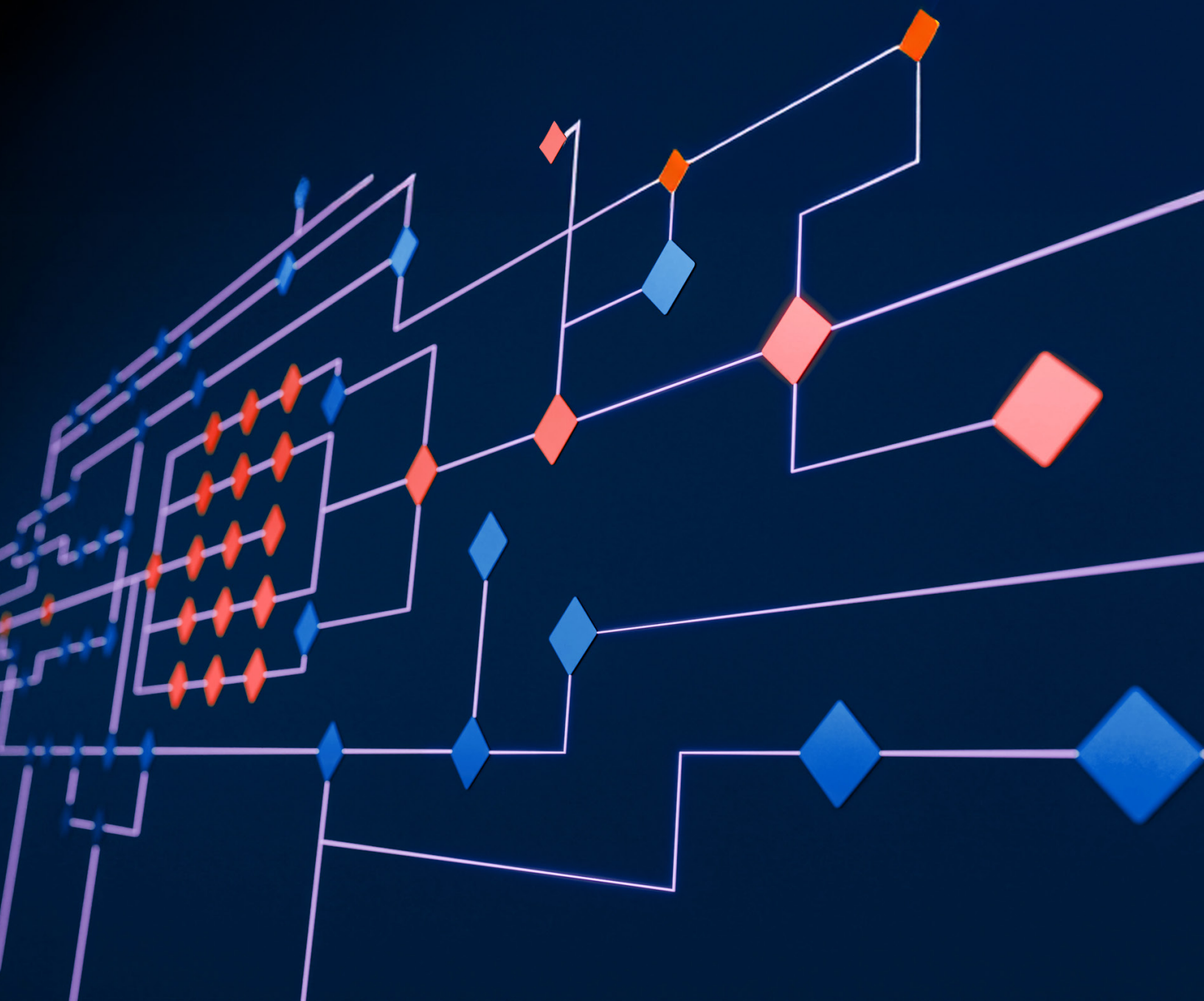


Gartner®

Build an Intelligent Front Door to Guide Service Experiences



Today's service experience is a "choose your own adventure," putting the customer in a difficult position of having to navigate a myriad of channels and information to find an answer. Customer service and support leaders should build an intelligent front door to guide the service experience.

Overview

Key Findings

- Years of adding self-service and assisted channels in an effort to provide customers choice has created a customer service journey that resembles a "choose your own adventure," resulting in high effort for the customer and high cost for the organization.
- Today's service experience measures success through the lens of channel performance, based on containment or case deflection, resulting in a myopic view of the customer's overall experience.
- The lack of a common user experience layer that sits across channels and a centralized intelligence to mediate customer-to-organization interaction results in the organization's inability to deliver the best experience at the most appropriate cost.

Recommendations

- Develop a complete view of the customer's service experience journey to better understand intent, paths to resolution, dead ends and points of escalation.
- Build an intelligent front door that provides a simplified entry point into the organization through a conversational interface, understanding customer intent and sentiment to provide customers the appropriate answer to their needs.
- Prepare for the intelligent front door by analyzing current volume, journeys and customer intents.

Strategic Planning Assumptions

By 2028, all self-service experiences will begin with a conversational interface using conversational AI.

By 2029, more than half of customer service and support organizations will have implemented an intelligent front door (IFD) in their organizations.

Introduction

For many customers, today's service experience can feel like a "choose your own adventure," putting the customer in a difficult position of having to navigate a myriad of channels and information to find an answer. They do so unsuccessfully, however, as only 25% of customers resolve their inquiry in the first channel.

This choose-your-own-adventure experience was inadvertently created by narrowly equating good service experience with providing customers channel choice and gauging success through the lens of channel performance, containment and case deflection.

For the customer, the focus on choice directs their attention away from the answer and places it on channel selection and navigation. For the organization, self-service and assisted service are not governed by a comprehensive strategy, resulting in inconsistent experiences that are costly to deliver.

How can the customer's and organization's goals be brought into alignment so that customers get faster access to better answers, while organizations deliver the best experience at the most appropriate cost?

To succeed, service and support leaders must develop a complete view of the customer's journey and provide customers a simplified entry point to resolving their needs. The entry point sits above the range of channel options and serves as a "front door," ensuring customers are welcomed, known and directed to the best path to get resolution.

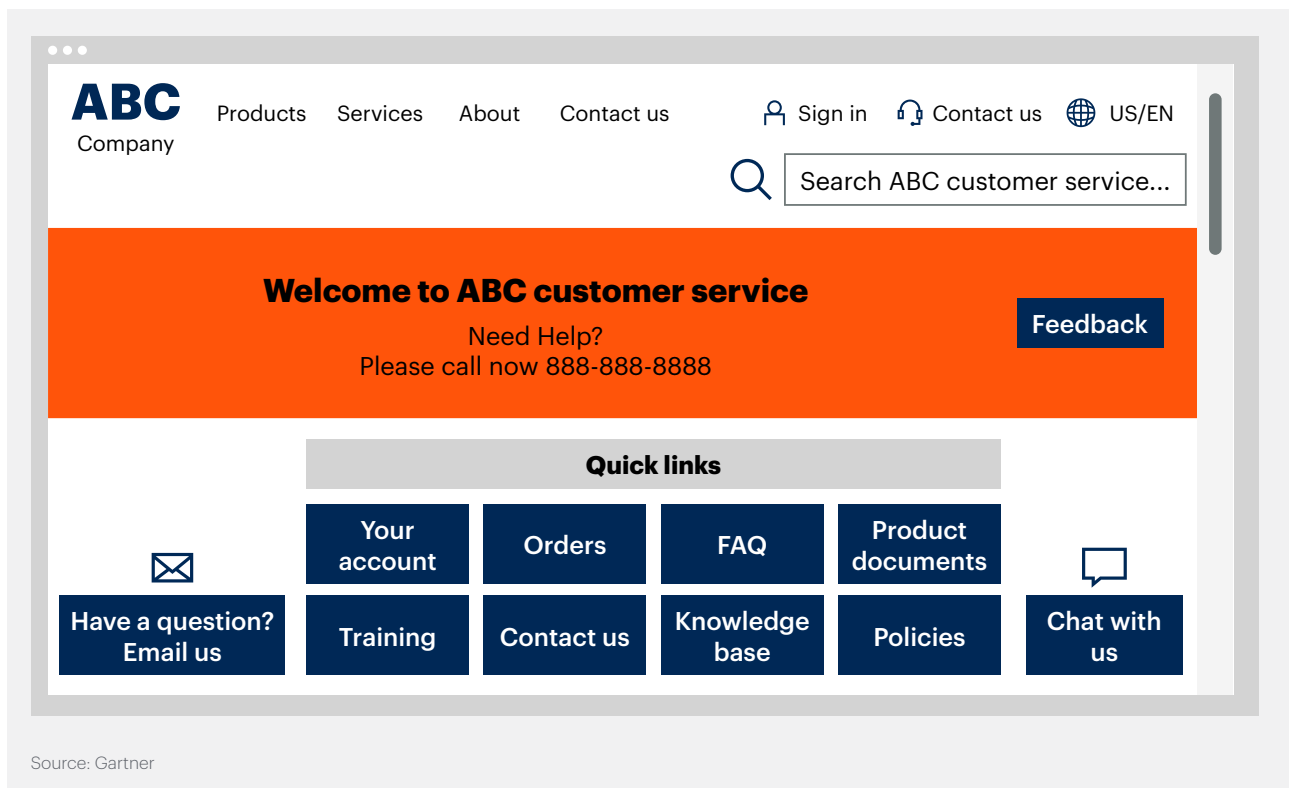
The intelligent front door welcomes customers through a conversational interface, understanding their intent and sentiment, and determining how to best address their needs. This is accomplished by applying a centralized intelligence to determine if the interaction is best addressed by generating an answer, enabling customers to transact, or connecting customers with subject matter experts.



This choose-your-own-adventure journey is further exemplified in Figure 2, which illustrates a common occurrence. After the customer makes their initial selection of “the company’s website,” they are then faced with another decision: “Should I call, email, chat, browse or search?” The choice is typically dictated by past experience or whichever option is easiest to follow.

This array of choices and the lack of a strategy that governs channel use hurts the customer by producing different experiences and outcomes based on their choice. It also negatively impacts the organization’s cost-to-serve model because customers are using more than one channel to obtain resolution.

Figure 2: Choose Your Own Adventure Example

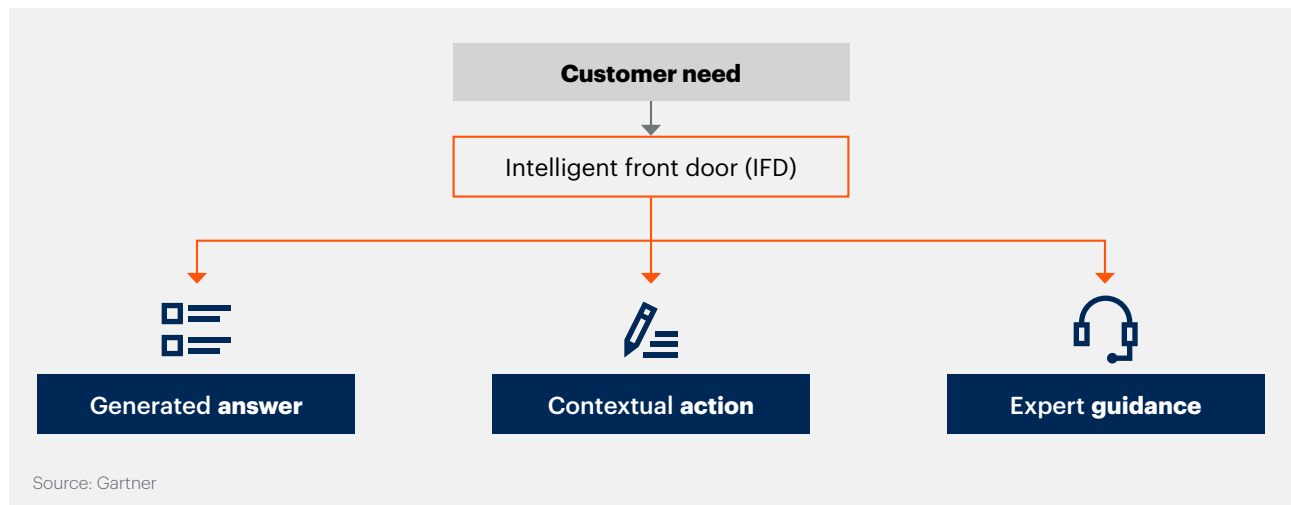


Build an Intelligent Front Door

IFD provides a single entry point into the organization through a common, conversational interface that uses speech, text or images for customers to describe their intent. IFD leverages a centralized intelligence to govern customer interactions in real time to guide the customer to the best resolution. That solution might be a generated answer, a contextual action, a real-time conversation with an agent or a scheduled meeting with a subject matter expert (see Figure 3).

An intelligent front door changes the way organizations engage with customers by removing circuitous paths to resolution that often result in dead ends and escalated journeys.

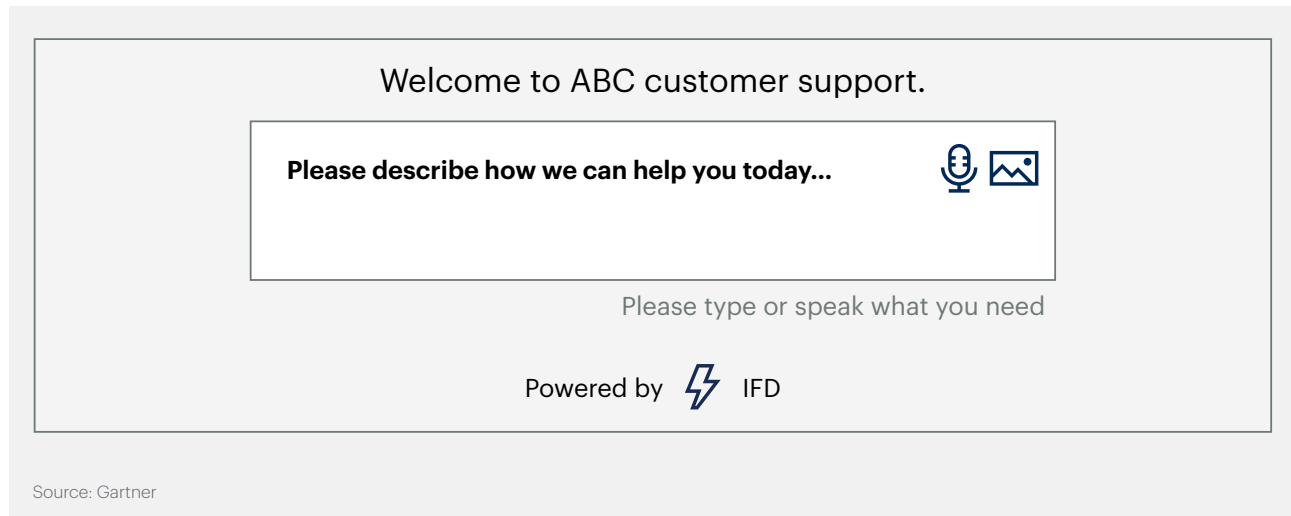
Figure 3: The Intelligent Front Door



How IFD Works

IFD uses both conversational AI and generative AI (GenAI) to engage with customers using speech or text that is contained within the channel the customer uses, be it a website, authenticated portal, mobile application or interactive voice response (IVR). For a website, authenticated portal or mobile application, IFD will take the form of an “intent box.” This allows customers to express themselves on their terms, answering the question, “Please describe how we can help you today” (see Figure 4).

Figure 4: IFD User Interface Example



The customer’s response to that question is sent to a model that classifies their intent. This is combined with all information either known or gathered about the customer to contextualize and generate an individualized response.

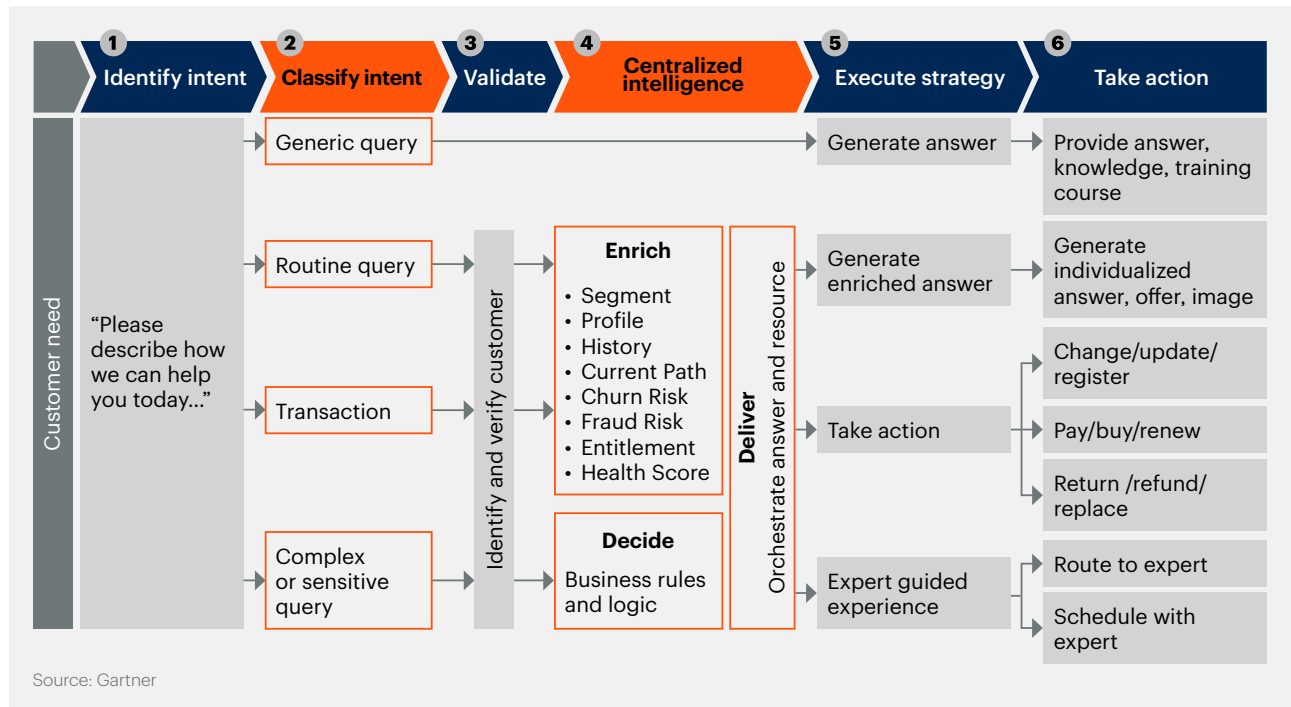
Intents that require authentication are run through the organization’s identification and verification process before being answered. Complex or sensitive intents can be directly routed to expert agents or an engagement scheduled with a subject matter expert, based on the need. For simpler intents, the customer could be directed to generated content or conversational AI to answer the question or guided through the process of taking an action online.

In addition to the conversational interface that unifies customer understanding, IFD provides a centralized intelligence, bringing business rules and logic out of individual channels and organizing them in a centralized decision management capability. This capability is then used to govern interactions collectively based on a 360-degree understanding of the customer. This capability provides organizations the ability to balance revenue, expense and customer experience objectives.

Figure 5 illustrates the six IFD processes and details from the organization’s perspective how a customer’s request flows through IFD.

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Figure 5: IFD Process



- **Process 1, identify intent:** What does the customer need? IFD can either predict the customer's need and/or ask the customer to describe their need through a conversational interface that supports speech and text. Within the IFD experience, we want to ask customers to "please describe their need" vs. providing keywords. This encourages customers to express their needs in detail using their terms.
- **Process 2, classify intent:** What is the nature of that need? IFD initially classifies the customer's intent to better understand what a customer is asking and potential strategies. Further classification is necessary to generate an answer or route to a subject matter expert. Intent categories can include those listed in Table 1.

Table 1: IFD Intent Categories

Intent Category	Category Description
Generic	Frequently asked questions such as hours of operation, locations, etc., that do not require a personalized response or require the customer to authenticate.
Routine	Queries the organization sees frequently that may require customer identification and verification to proceed and can be enriched with data to personalize. IFD may be required to engage in a two-way dialogue with customers to better understand the question and refine the response.
Transactional	Transactions that require identification, verification and data enrichment to individualize the response. These transactions require integration with additional systems outside of IFD such as CRM, enterprise resource planning, identity management, payment systems, etc.
Complex/Sensitive	Queries that may be partially automated but require a subject matter expert to resolve. These queries can be routed in real time to subject matter experts within service and support or scheduled with subject matter experts that may not be part of customer service and support organization. Organizations should consider their broader ecosystem of talent when scheduling these types of engagements.

Source: Gartner

- **Process 3, validate:** Who is the customer, and can we identify and verify them against information we already have or know about them?
- **Process 4, apply intelligence:** How do we best handle the customer's intent and how can we enrich the response if one is being generated for them? IFD intelligence consists of three capabilities:
 - Enriching answers with data to provide context and individualization
 - Applying business rules and logic that govern how the answer and any corresponding information will be provided to the customer, be it generated, delivered through an agent or scheduled with a subject matter expert.
 - Orchestrating, which delivers the answer or connects the customer to a subject matter expert.
- **Process 5, execute strategy:** Which strategy should be executed based on the customer's intent, information we have about the customer and what is contained in the business rules and logic (centralized intelligence). Do we answer the customer's question with a generated response? Route to an expert?
- **Process 6, take action:** Which specific action do we take in executing the strategy? Taking action is where the strategy is specified and individualized for each and every customer. This is akin to a personalized next best action.

Key IFD Capabilities

The intelligent front door strategy is enabled through a series of capabilities, including the following:

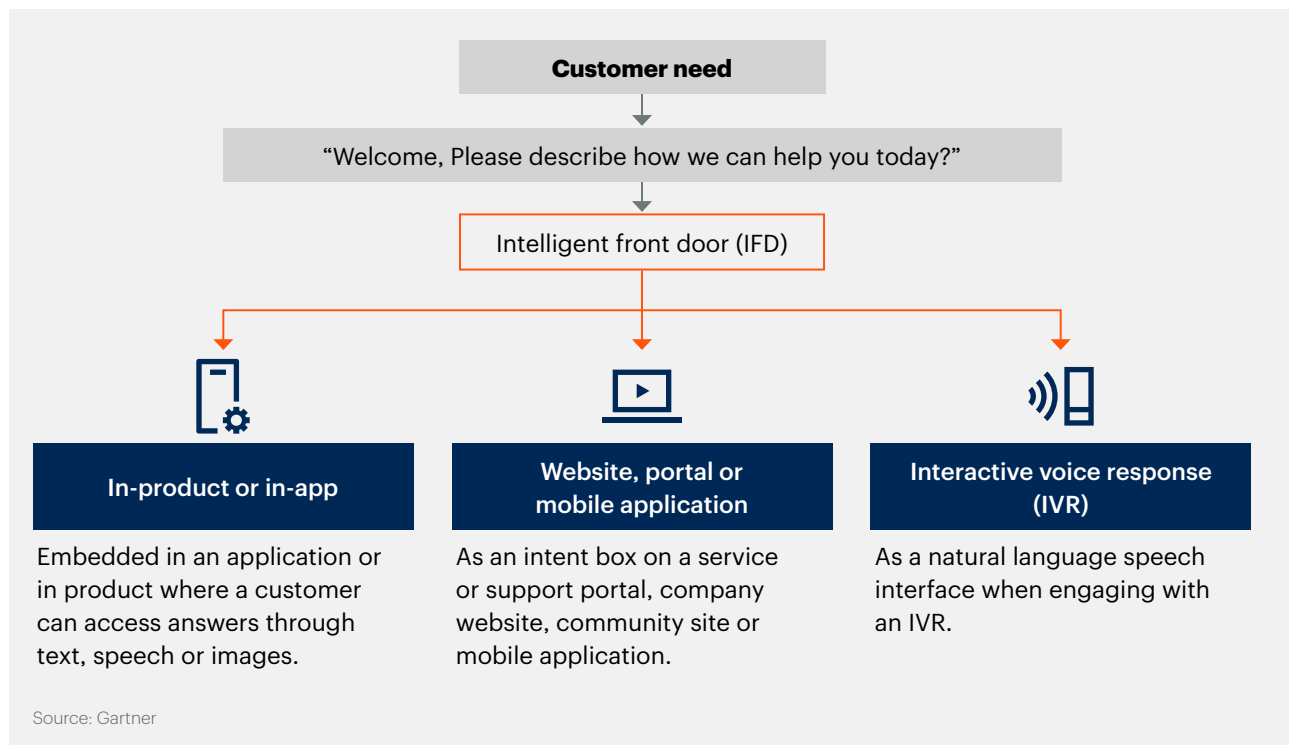
- **Conversational interface:** That can process natural language inquiries via speech or text and provide immediate answers or engage customers in a two-way dialogue
- **Intent prediction:** Ability to predict customer intent based on customer path and/or customer information if identified and verified
- **Intent classification:** Ability to classify customer described needs into intent categories, including generic, routine, transactional or complex/sensitive to be used in execution strategy
- **Integration with various channels:** Supporting multiple communication channels, such as voice, email, chat and social media, and ensuring a consistent experience
- **Proactive service:** Anticipating customer needs and providing solutions before they even ask, based on historical data and predictive analytics
- **Personalization:** Tailoring individualized responses and solutions based on the customer's history and preferences
- **Intelligent routing:** Routing to an agent or expert based on customer intent and information and agent or subject matter expert skill or other unique variables
- **Real-time translation:** The ability to translate generated content into customer's language
- **Sentiment analysis:** Ability to detect customer sentiment and use that to influence the strategy
- **Transaction processing:** Completing end-to-end transactions, such as as paying a bill and booking an appointment



IFD in Action and Deployment Options

The IFD strategy is capable of being deployed across channels, to include the IVR, website, support portal, mobile application, SMS and in-product (see Figure 6). This capability preserves customer channel preference while ensuring customers receive the same experience regardless of channel.

Figure 6: IFD From Anywhere



Organizations can retire or rationalize channels when ready and in accordance with their broader strategy. For those organizations that still have a majority of their interactions via phone and wish to continue and enhance that option in combination with digital.

IFD deployment options may also be based on industry, intent complexity/sensitivity, technology and operational readiness:

- For example, organizations that are ready (meaning, understand what it will cost and how to support a GenAI deployment) to implement customer facing GenAI can use the IFD intent box to generate responses to routine inquiries while providing response citation.

Other organizations that may not be ready for customer-facing GenAI can use the intent box to return a unified list of knowledge articles and other content for a customer to browse and select.

Prepare for an IFD

Implementing the IFD strategy may feel like a long way from where you are today, especially if your current experience looks like Figure 1. If you're not ready for an intent box delivering generative responses, there are still components and improvements you can implement starting today:

- **Review current UX:** Look for ways to simplify the design such as reducing competing channel choices
- **Dedupe:** Remove any duplicative or confusing language
- **Analyze user experience monitoring (UEM):** Leverage UEM capabilities that utilize heatmaps to understand the most used paths and customer journeys
- **Focus on knowledge management:** Ensure knowledge management practices are up to date and include processes to create new, manage existing and archive/retire expired content
- **Develop data integration:** Create a framework of the data integration that is needed to power the centralized intelligence and ensure there are processes in place that keep it up to date
- **Provide educational content:** Ensure existing educational material is designed and developed for individuals
- **Analyze interactions:** Begin to classify intent for current interaction volume into four groupings: generic, routine, transaction or complex/sensitive
- **Map intent classification to strategy:** Begin to map the strategies and actions you will take based on the intent classifications and intents themselves.

Evidence

2024 Gartner State of the Customer Survey. This annual survey enables customer service and support leaders to understand trends in customer preference and behavior.

Actionable, objective insight

Position your organization for success. Explore these additional complimentary resources and tools for customer service and support leaders:



Guide

Customer Service Experience Done Right

Leverage customer service experience strategies to boost customer loyalty and achieve business growth.

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Guide

Key Customer Self-Service Capabilities and Strategies

Learn how to implement 11 foundational capabilities to improve your customer experience and deliver self-service success.

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Report

Customer Service Technology: 3 Actions to Boost Efficiency

Discover strategies to align customer service technology with business objectives and maximize investment value.

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Webinar

Power the Future of Service With an Intelligent Front Door

Learn how to effectively integrate agentic experiences into your organizations while developing self-service solutions that minimize customer effort.

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