

# What does an AI-augmented customer service and success team look like?

## Customer service and success team

Where customer success and service are heading in the next two to three years, and what GRAIL believes it takes to get there first.

*“Every signal is noticed. Every judgment has an owner.”*

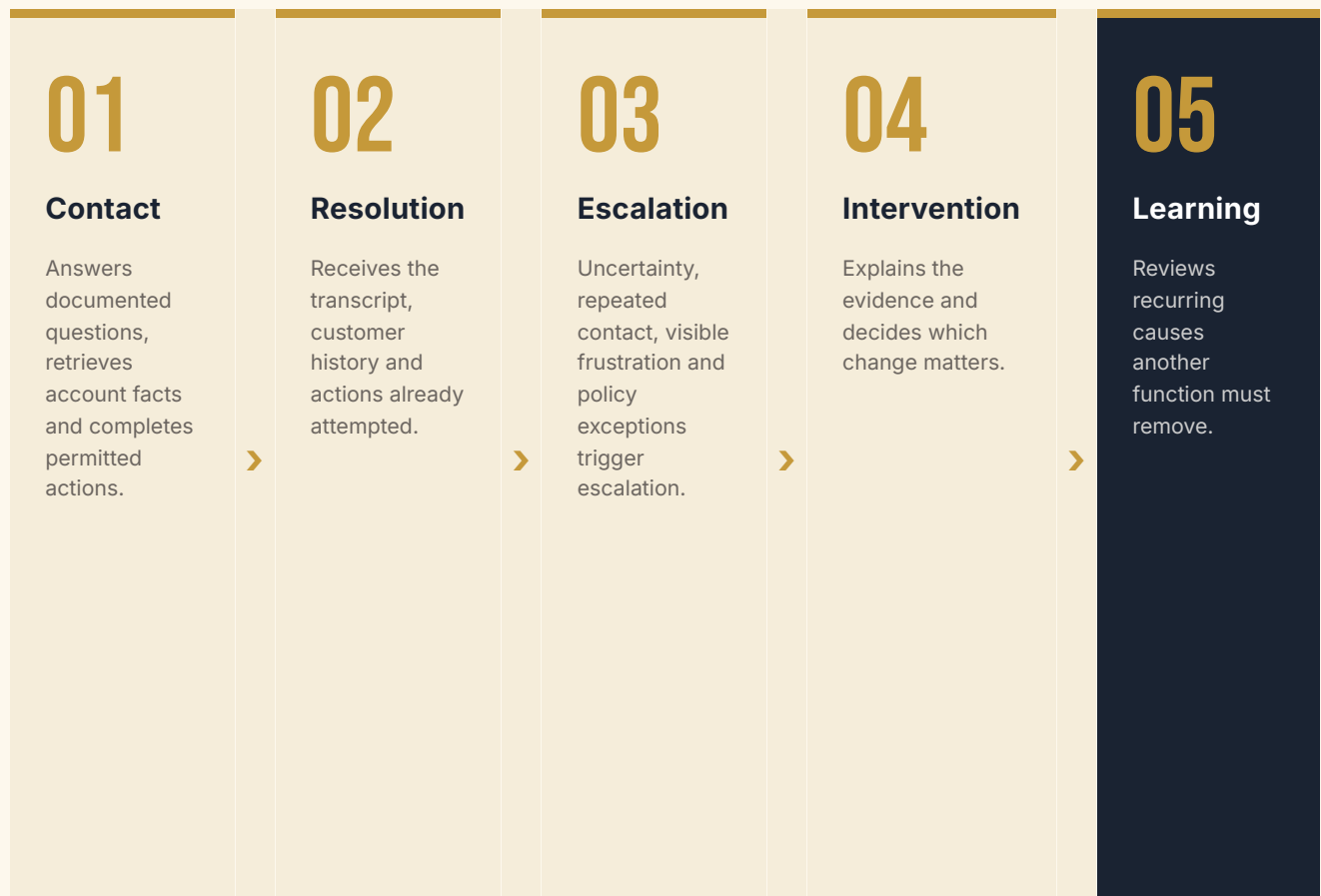
- 01 What is your queue revealing that your company still leaves unfinished?
- 02 Which customer warning signs does your company only see after contact?
- 03 Where will your people spend the time your systems return?

# WHAT DOES AN AI-AUGMENTED CUSTOMER SERVICE AND SUCCESS TEAM LOOK LIKE?

*Where customer success and service are heading in the next two to three years, and what GRAIL believes it takes to get there first.*

Customer work begins too late. Service waits for the contact. Success waits for the review or renewal date. **The change that matters is that the whole function learns to sense customer movement continuously, resolve the routine immediately and direct people toward the moments that need judgment.** The relationship stays with the person. The attention becomes institutional.

## THE 2028 CUSTOMER DAY



*Every signal is noticed. Every judgment has an owner.*

GRAIL's view, from building AI-augmented work inside operating functions. A position, not a survey.

# The queue hides the *customer*.

Customer service and customer success protect recurring revenue, repeat purchases and reputation. Service resolves what has already gone wrong. Success improves adoption, retention and qualified expansion. In software companies they are named teams. Consumer companies often organise a larger member-service or contact-centre operation. Industrial companies spread the same work across sales, delivery and a support desk.

## Nine processes

|    |                                             |    |                                                  |
|----|---------------------------------------------|----|--------------------------------------------------|
| 01 | Inbound support                             | 06 | Complaint handling and escalation                |
| 02 | New-customer onboarding                     | 07 | Knowledge-base and self-service management       |
| 03 | Adoption and customer-health monitoring     | 08 | Voice of customer back to product and operations |
| 04 | Renewals and churn prevention               | 09 | SLA and service-performance reporting            |
| 05 | Expansion identification and sales handover |    |                                                  |

Where the information lives is the problem. Tickets sit in the service platform. Usage sits in product analytics. Ownership and opportunity history sit in CRM. Contracts, orders, invoices and payment status sit elsewhere. Guidance is distributed across document stores, articles and the memories of experienced employees. The service record shows what happened. It rarely explains why the resolution worked, what warning signs preceded churn or what the customer was trying to accomplish.

The measures do not form one coherent system either. Ticket closure rewards throughput. Retention arrives months later. First response, backlog and SLA attainment can improve while repeat contact, effort and trust move the wrong way. Customer success teams inspect account portfolios manually, while service teams work through an undifferentiated queue.

## The function is rich in customer evidence and poor at assembling it in time to change the outcome.

The customer appears in fragments: a ticket, a usage decline, a missed payment, a complaint, a renewal date. By the time one person sees the whole picture, the risk has often hardened.

# Customer attention becomes *continuous*.

The function changes at two structural points.

**The function moves from a reactive queue to continuous customer sensing.** Usage, delivery, billing, sentiment and service events are watched together. Work no longer begins only when a customer asks for help or a renewal enters the calendar. People receive the changed evidence, decide whether it matters and choose an intervention that fits the relationship. Prevention becomes a system, rather than a personal habit of the strongest CSM.

**The unit of output moves from contacts processed to customer outcomes protected.** Documented questions can be answered continuously. The scarce work becomes technical diagnosis, complaint recovery, adoption improvement and changing the product or delivery process that caused the contact. Service, success, product, sales and operations therefore stop acting as separate destinations for customer evidence. Each interaction becomes input to the next decision.

Routine resolution can become faster while quality holds or improves. The pattern is weaker for disputes, vulnerable customers, contractual exceptions and technically ambiguous problems. Those moments need experienced people with authority, not another layer of routing.

The queue becomes a sensor. The account plan becomes a live reading. The contact becomes evidence for changing the system that caused it.

**WHERE IT IS WEAKEST** The combination is weakest where the facts are incomplete, the customer is distressed or the remedy changes a material commitment. Those stay with human judgment, and should.

# A day, a week, a *month*.

A function that invests heavily still employs service specialists and CSMs in 2028. Its shape changes. Fewer people spend the whole day retrieving answers or inspecting accounts that have not changed. More capacity sits in complex resolution, customer advice, knowledge ownership and service-operations design. A small function assigns these responsibilities across existing roles rather than creating a separate job for each one.

## The day

### CONTACT

A disclosed digital service layer receives written contacts. It answers documented questions, retrieves account facts and completes permitted actions. The customer can request a person. Uncertainty, repeated contact, visible frustration, policy exceptions and material financial consequences trigger escalation.

### RESOLUTION

The specialist receives the transcript, customer history, actions already attempted and a proposed remedy. Their queue is prioritised by ambiguity, severity and customer consequence. They diagnose, question and decide. The customer does not have to reconstruct the story.

### INTERVENTION

Each CSM receives a short brief on customers whose usage, support pattern, payment status or relationship engagement changed overnight. The brief explains the evidence. The CSM decides which change matters, who should act and what the relationship can bear.

**THE WEEK** The team reviews unresolved friction, accounts requiring intervention and recurring causes another function must remove. Product receives themes linked to source conversations and affected revenue. Sales receives qualified expansion signals with evidence. Operations receives failures linked to orders, deliveries or installations. Knowledge owners review unanswered questions, weak resolutions and policy changes before publishing revised guidance.

**THE MONTH** The function head reviews outcomes by customer cohort rather than ticket averages alone. The review covers containment, repeat contact, customer effort, complaint recovery, time to value, adoption, retention risk and expansion accepted by sales. Health models are checked against actual renewals and churn. Permissions widen only when test results and incident history justify it.

Daily monitoring for every account, tailored onboarding for every customer, quality review across every conversation and a traceable path from friction to revenue. Work once reserved for the most important cases becomes the normal operating standard.



# What runs, and what stays with the *person*.

| PROCESS                              | WHAT THE AGENT DOES                                                                                                              | WHAT STAYS WITH THE PERSON                                                            |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>Inbound support</b>               | Answers approved informational intents, retrieves guidance, summarises history, drafts replies and routes exceptions             | Diagnostic questioning, ambiguous resolution, policy exceptions and customer recovery |
| <b>Onboarding</b>                    | Prepares a customer-specific plan from the contract, objectives and implementation material; monitors progress and drafts nudges | Milestones, implementation politics and ownership of time to value                    |
| <b>Adoption and health</b>           | Combines usage, support, delivery and relationship signals; explains what changed                                                | Validation of the diagnosis and the intervention that fits the account                |
| <b>Renewals and churn prevention</b> | Maintains the evidence brief, surfaces earlier risk and prepares a suggested save plan                                           | Relationship judgment and every commercial commitment                                 |
| <b>Expansion handover</b>            | Finds unused entitlements, capacity constraints and repeated requests; prepares a source-linked brief                            | Timing, customer trust and qualification of commercial fit                            |
| <b>Complaints and escalation</b>     | Reconstructs prior contacts, failed attempts, severity and policy; drafts a remedy and routes it by authority                    | Sensitive redress, exceptions and the decision that rebuilds trust                    |
| <b>Knowledge and self-service</b>    | Finds unanswered questions, conflicting articles and useful resolutions; drafts revised guidance                                 | Review, interpretation and publication by the knowledge owner                         |
| <b>Voice of customer</b>             | Groups conversations, reviews and surveys; quantifies affected customers and links themes to source records                      | Product priority and the choice of what to change                                     |
| <b>SLA and performance reporting</b> | Assembles end-to-end reporting and screens interactions against policy and resolution criteria                                   | Investigation of exceptions and interpretation of performance                         |

*The right-hand column deserves the closest attention. It contains diagnosis, authority, trust and commercial judgment. The left-hand column gives those decisions better evidence and more of the team's time.*

# Four stages, and the *service-stack position* today.

The sequence follows value and risk across GRAIL's Access Ladder.

- 01 Documents only**  
Approved articles, implementation material, task contracts and exported feedback support searches, drafts, plans, summaries and synthesis. People add customer context and approve outputs.
- 02 Read access**  
Service records and approved knowledge ground answers and track resolution, repeat contact and escalation. CRM, product usage, subscriptions, invoices, orders and delivery status add operational truth.
- 03 Read and act with approval**  
The agent proposes notes, tags, routing, tasks and customer actions. Identity checks, monetary limits and named approval precede execution. Each write records its approval and result.
- 04 Bounded autonomous action**  
Internal routing and verified task creation follow fixed rules. Records capture identity, inputs, action and result. Material remedies, subscription changes and commitments require human approval.

## The service-stack position, as of September 2026

|                                 |                                                                                                                                                       |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Zendesk</b>                  | Its MCP client calls selected Action Builder tools. REST APIs and signed webhooks support ticket and knowledge operations.                            |
| <b>Freshdesk</b>                | Its hosted MCP beta for selected Enterprise customers reads and writes tickets, contacts and knowledge. REST v2 supports sensitive actions.           |
| <b>Intercom</b>                 | Its remote MCP server reads records and writes help-center articles for US-hosted workspaces. EU-hosted deployments use the EU REST API and webhooks. |
| <b>HubSpot Service Hub</b>      | Its remote MCP server supports broad reads and selected writes under user permissions. The public beta excludes Sensitive Data.                       |
| <b>Salesforce Service Cloud</b> | Hosted MCP servers govern reads and mutations by permission. Custom servers expose Flows or Apex actions. Headless 360 is beta.                       |
| <b>Business Central</b>         | The official MCP server is read-only by default. Administrators can enable defined writes with user attribution.                                      |
| <b>Fortnox</b>                  | APIs expose customers, orders, invoices and articles. No official MCP endpoint was identified; workflows use APIs and events.                         |

Point connections answer current questions. Longitudinal work needs a shared layer for cohort comparison, health calibration, signal testing and replayable evaluation.

# Six things we believe, from building *this*.

---

Customer success and service are often treated as downstream functions. We believe they are becoming the operating nerve centre for customer truth. Six things follow from that shift.

## 01 **The queue is evidence of work the company failed to finish elsewhere.**

A repeated contact may begin in the product, the invoice, the installation or the promise made during a sale. Resolving the ticket matters. Removing the cause is where the function changes the customer outcome.

---

## 02 **Continuous sensing changes more than response speed.**

The important moment may happen before a contact exists: usage falls, payment changes or a relationship goes quiet. The operating layer notices the movement. A person decides whether it is risk, noise or an opening to help.

---

## 03 **A health score without an explanation is another queue.**

CSMs do not need more alerts to inspect. They need the evidence that changed, the source behind it and a clear reason the account deserves attention. The intervention remains a human choice because the same signal means different things in different relationships.

---

## 04 **Human access is part of the design.**

Uncertainty, frustration, repeated contact and material consequences are not failures at the edge of the service layer. They are the conditions that define its boundary. If reaching a person is difficult, the company has moved work onto the customer and called it progress.

---

## 05 **Released capacity needs an address.**

Time no longer spent retrieving answers or inspecting unchanged accounts does not create customer value by itself. Leadership must assign it to adoption, retention, complaint recovery, technical exceptions or root-cause removal. Otherwise the old queue simply finds a new form.

---

## 06 **Knowledge becomes an operating responsibility.**

Outdated guidance can affect every interaction at once. Someone must own unanswered questions, conflicting articles, policy changes, test cases and weak resolutions. The strongest service layer is not the one that writes most. It is the one whose approved knowledge keeps learning from real customer work.

---

These six beliefs are not positions on tools. They concern how a company notices, resolves and learns from customer reality. Every system laid on top inherits them.



# Roles, rhythm, and where it *fails*.

Frontline service roles move from retrieving answers to resolving exceptions. Employees need diagnostic questioning, policy judgment, technical depth and complaint recovery. They learn to inspect the assembled history, challenge weak guidance and recognise when authority matters more than speed.

CSMs move from manually inspecting every account to managing a prioritised portfolio of interventions. They need commercial judgment, skepticism toward health models and the ability to design a customer action that fits the relationship. Team leads become responsible for the performance of people and service workflows together.

Operations specialists take ownership of evaluation design, data interpretation and permissions. Knowledge ownership becomes formal because one stale answer can now travel through every automated interaction. The function head spends less time explaining backlog and more time deciding which problems deserve people, which causes require another function to act and where released capacity should go.

## The rhythm

### FIRST INTERNAL COPILOT

Approved knowledge supports employees inside the existing service workflow

### 6 TO 12 WEEKS

One controlled customer-facing intent runs with clear escalation and human access

### AFTER THE FIRST INTENT

Read access broadens, actions begin with approval, and knowledge ownership becomes a team rhythm

### 6 TO 12 MONTHS

Planning, role design and management measures begin to change around customer outcomes

*The pace assumes one service platform, usable knowledge and a small number of languages. Multiple brands, weak identity data or complex customer decisions lengthen the path.*

**WHERE IT FAILS** Deflection rises while repeat contact and customer effort worsen. Customers cannot find a person. Stale knowledge produces grounded but wrong answers. Actions begin before identity, permissions and reversal work. Every customer and intent is treated alike. Opaque scores become employee measures. Released time has no destination in adoption, retention or root-cause removal.

Involve the people whose work changes before it changes. The service layer becomes credible when frontline experience defines its tests, its boundaries and its path to a person.

HAVE YOU THOUGHT ABOUT THIS?

# Twelve questions for the function *leader*.

---

- 
- 1 Your most common questions could be resolved immediately while customers who need judgment reach a person with the full history. Which contacts would you trust this way first?
  - 2 Usage, service history and payment behaviour could be watched together, with each CSM receiving the changed evidence. Which customers are becoming risky without anybody noticing?
  - 3 Every new customer could receive an onboarding plan based on the contract, use case and current progress. Where does onboarding still depend on which CSM happens to run it?
  - 4 Renewal work could begin when behaviour changes rather than when a date appears on a calendar. How much more could your team save with 90 days of warning?
  - 5 Product usage and support requests could reveal credible expansion opportunities and send sales a source-linked brief. How many customer needs disappear between service and sales?
  - 6 Every complaint could arrive with prior contacts, relevant policy and attempted fixes already assembled. How much customer frustration comes from having to repeat the story?
  - 7 Unanswered questions could become draft knowledge articles for an owner to review. What proportion of repeated tickets exists because the knowledge base is behind the product?
  - 8 Every conversation could be checked for policy compliance and resolution quality instead of reviewing a small sample. Which quality problems would become visible if coverage reached 100%?
  - 9 Feedback from tickets, surveys and reviews could be grouped continuously and linked to affected revenue. Which product decision is being made from the loudest anecdote?
  - 10 Recurring demand could be traced to the product release, delivery failure or billing process that caused it. Which team would act differently if the impact of each root cause were visible?
  - 11 Customers could request an order update, subscription change or appointment without an employee navigating the underlying system. Which safe action should become available first?
  - 12 Service measures could move from tickets closed to customer effort, repeat contact and revenue protected. Which current target encourages the team to finish a ticket without finishing the customer's problem?
- 

*These are the questions the programme is built to answer with the people who run the function, using their own customers, records and operating reality rather than a generic model.*