



The AI Guidebook

FOR CUSTOMER SUPPORT LEADERS
MANAGING COMPLEX OPERATIONS

Preface **1**

Where Most Platforms Fall Short
for Complex Support Operations **2**

Hiver: Built for Complex Support **3**

Final Word **4**

Table of Content

Preface

Most organizations with complex support operations aren't working with tools built for them. They're operating with makeshift setups: platforms designed for simpler, more transactional support, stretched to cover something they were never built for. This pattern shows up clearly in how these platforms have approached AI: bolted on as an afterthought rather than built into the foundation.

Every customer support platform today will tell you they offer AI capabilities. But if you look past the headlines, you'll find that AI is mostly built to handle the 20% simple, repetitive questions. The other 80% - the complex cases that require inputs from multiple teams and don't fit a decision tree, still lands entirely on your team.

This is what Hiver is built to solve. For the messy, complex cases that involve multiple steps, teams, and tools. This guide covers where support infrastructure typically breaks down for teams with complex support operations, what a setup built for this kind of work actually looks like, and how to tell whether your team is measuring the things that matter.



Why most customer support platforms aren't built for complex support

Most support platforms share a foundational assumption that support is a series of discrete interactions, each one independent of the last. This largely works for high-volume, B2C support. But for organizations with more complex support demands, involving multiple departments or cross-team handoffs, this assumption breaks down easily. Let's look at why.



A) AI built for deflection, not complexity

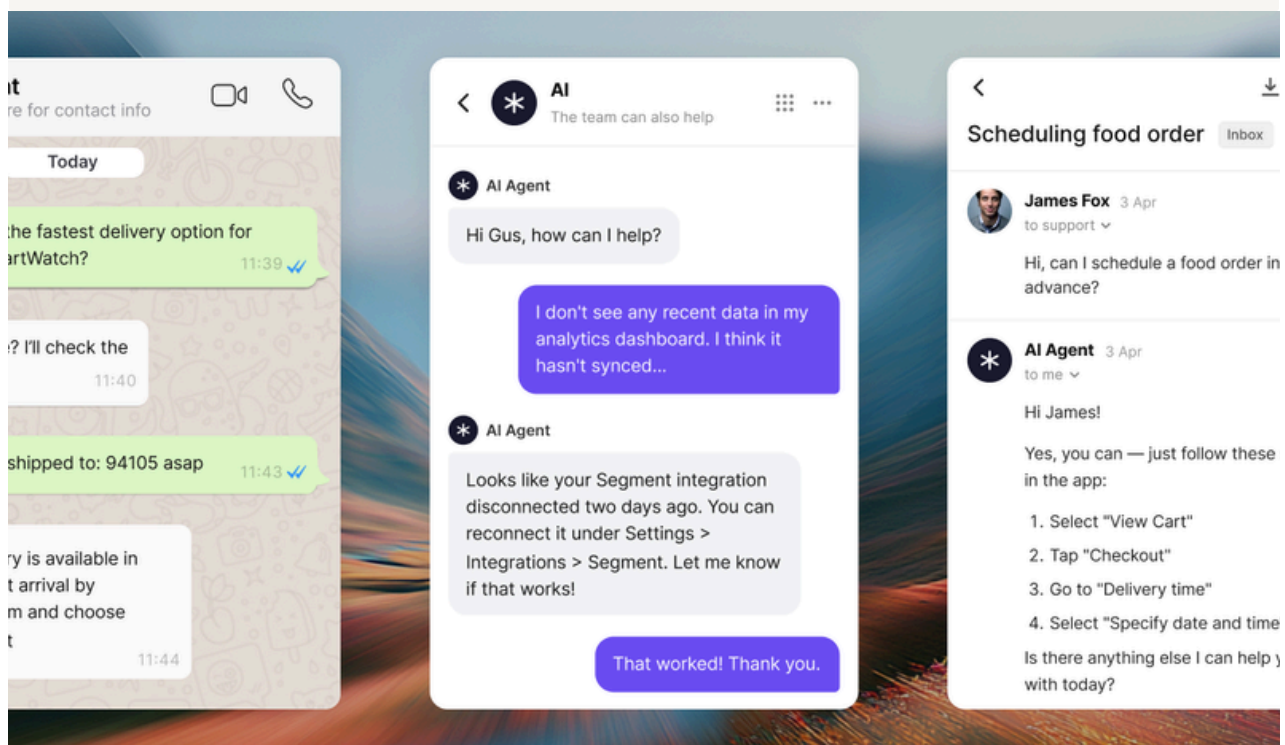
Every customer service platform today is building AI to deflect and automate the easy work. The password resets, order status, and "where's my refund" tickets. The moment a query spans two systems, needs judgment, or breaks the script, their AI hands it off, and the bulk of the work still lands on your support representatives.

AI systems are built mostly for volume and simple FAQ type requests which involve pulling an article from the help center and replying back to the customer.

A complex issue from a high-value account that typically needs support, Customer Success, and sometimes product teams working together with full context, falls outside the ambit of such systems. The answer to the customer request is often buried in three tools and an SOP that lives inside Confluence. And this, is not something most AI platforms can handle.

The gap between how AI is positioned and how it actually performs shows up in the data. According to Hiver's [State of AI in Customer Support 2026](#), only 9% of support leaders report that AI assists with most of their ticket volume.

For most teams, AI handles the first touch and drops off from there. The complex, multi-step issues remain human-led. Platforms built around deflection are optimizing for the easiest part of the workflow and leaving teams on their own for everything that actually matters.



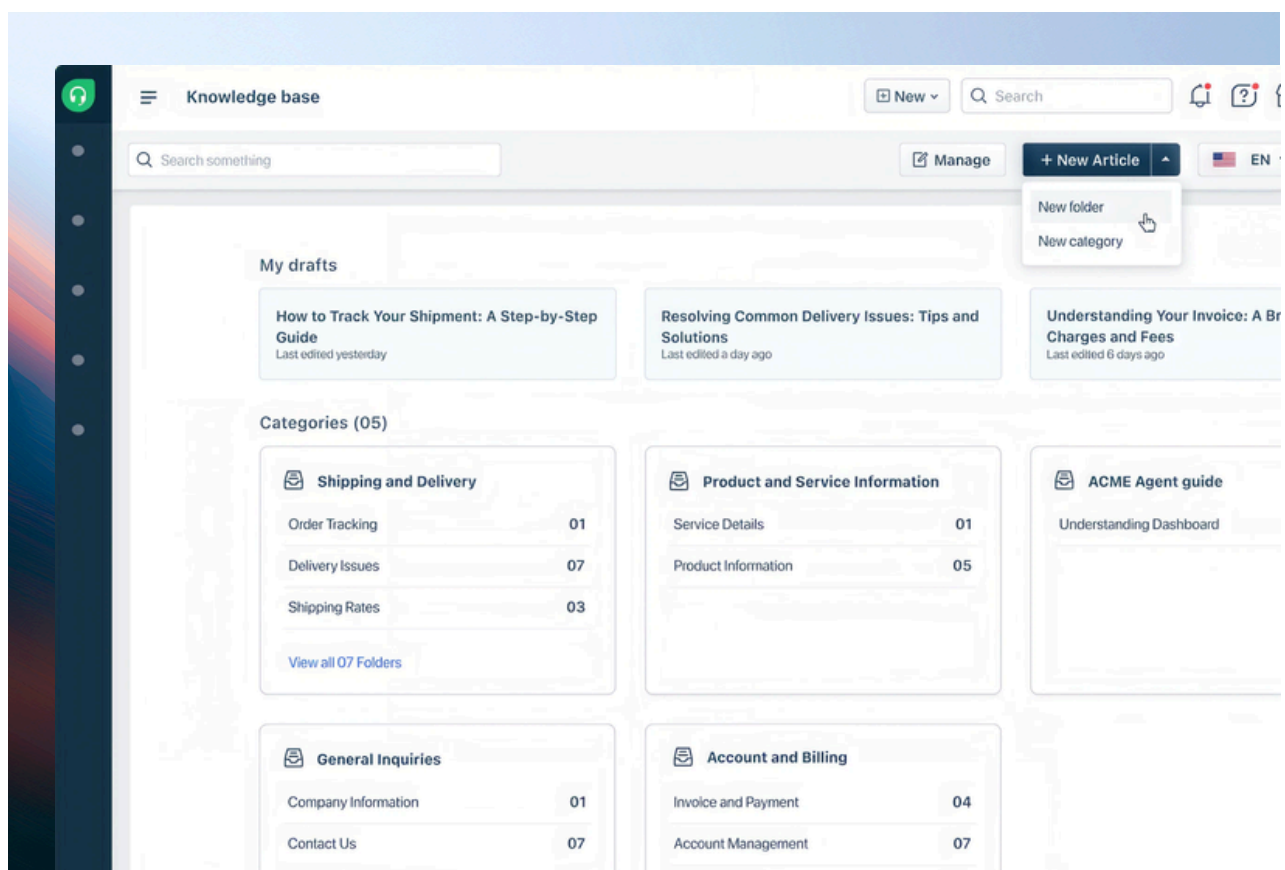
Most platforms optimise for the percentage of FAQ-type tickets they can close autonomously

B) Knowledge that works against you, not for you

Most helpdesks give you a place to store documentation - a customer-facing help centre, an internal wiki, and articles accumulated over time. What they don't give you is a way to keep any of it current.

Documentation doesn't update itself. Every article needs a human to notice when the product changed, the policy shifted, or the process moved, and then go rewrite it. That upkeep rarely happens on schedule. So articles go stale as products evolve, support reps create duplicate entries instead of updating old ones, and the only signal that something's wrong is a customer getting an incorrect answer. By which point, the damage is done.

The problem compounds when you introduce AI. A copilot or answer bot is only as reliable as the knowledge it draws from. Outdated documentation not only slows reps down - it also causes AI to deliver wrong answers confidently.

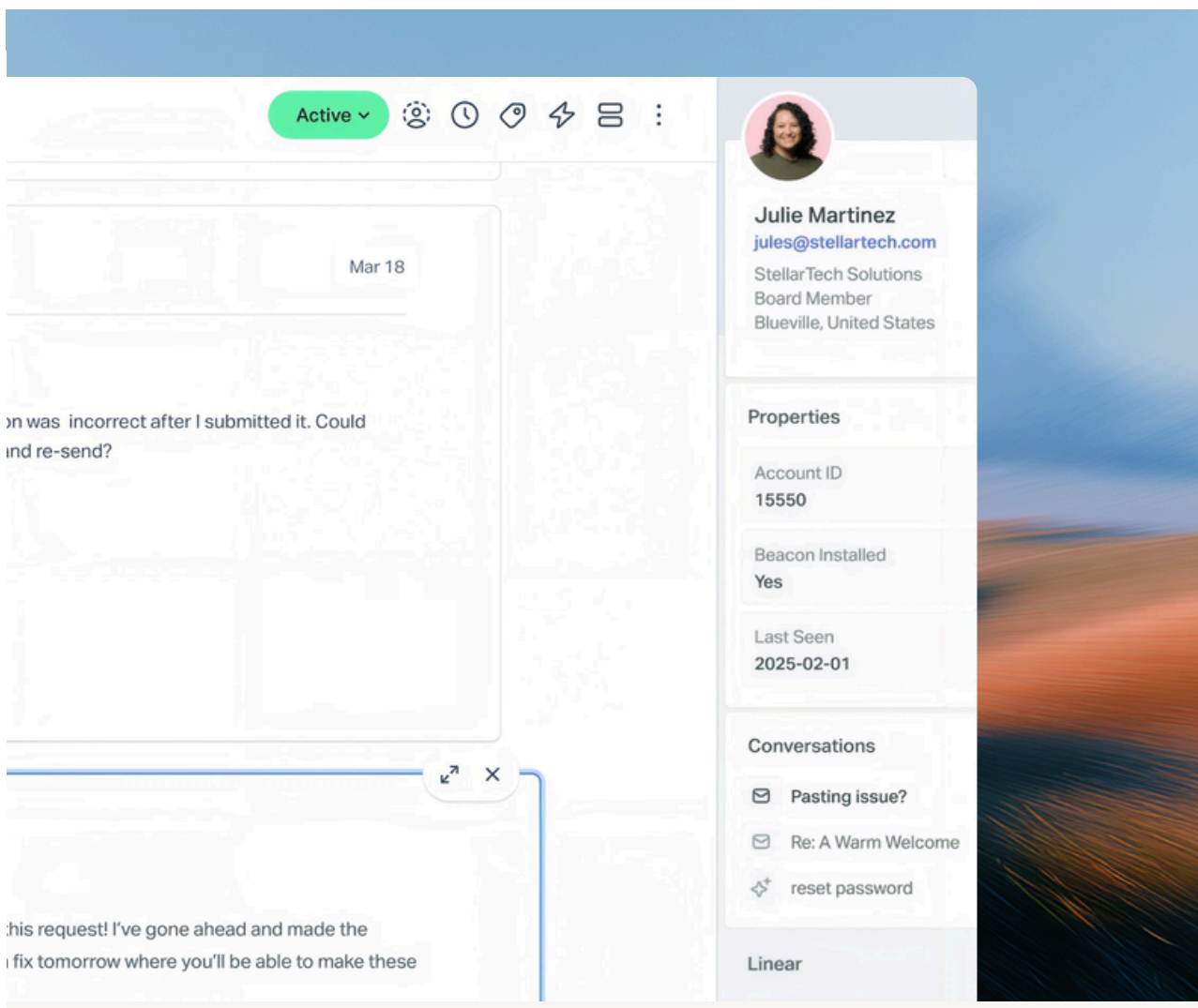


Freshdesk's knowledge base is a static repository that requires manual upkeep

C) You don't get the full picture on customer context

Every support rep worth their salt will tell you that the broader context is hidden in calls, emails buried in the CSM's inbox or in the CRM, support tickets, and product usage signals. Knowing the full customer context across every touchpoint is critical. Sentiment lives in tone. Risk lives in the implementation call. Expansion lives in "we're hiring three more people on the data team."

It is impossible to offer great customer service without being aware of that broader context and intelligence.



The screenshot displays a customer profile interface. On the left, a chat window is visible with a message dated 'Mar 18' that reads: 'on was incorrect after I submitted it. Could and re-send?'. Below this, another message is partially visible: 'his request! I've gone ahead and made the i fix tomorrow where you'll be able to make these'. On the right, a sidebar contains the following information:

- Active** (dropdown menu)
- Julie Martinez**
jules@stellartech.com
StellarTech Solutions
Board Member
Blueville, United States
- Properties**
 - Account ID: 15550
 - Beacon Installed: Yes
 - Last Seen: 2025-02-01
- Conversations**
 - Pasting issue?
 - Re: A Warm Welcome
 - reset password
- Linear**

Typically you only get information on who the person is and their past interactions

D) Automations that are built only for simple if/then workflows

Most support platforms are built for deterministic, rule-based automation. If a ticket is unassigned for two hours, send a reminder. If a tag is added, route to a specific team. Each rule fires on its own, with no memory of what came before it and no way to branch based on what happens next.

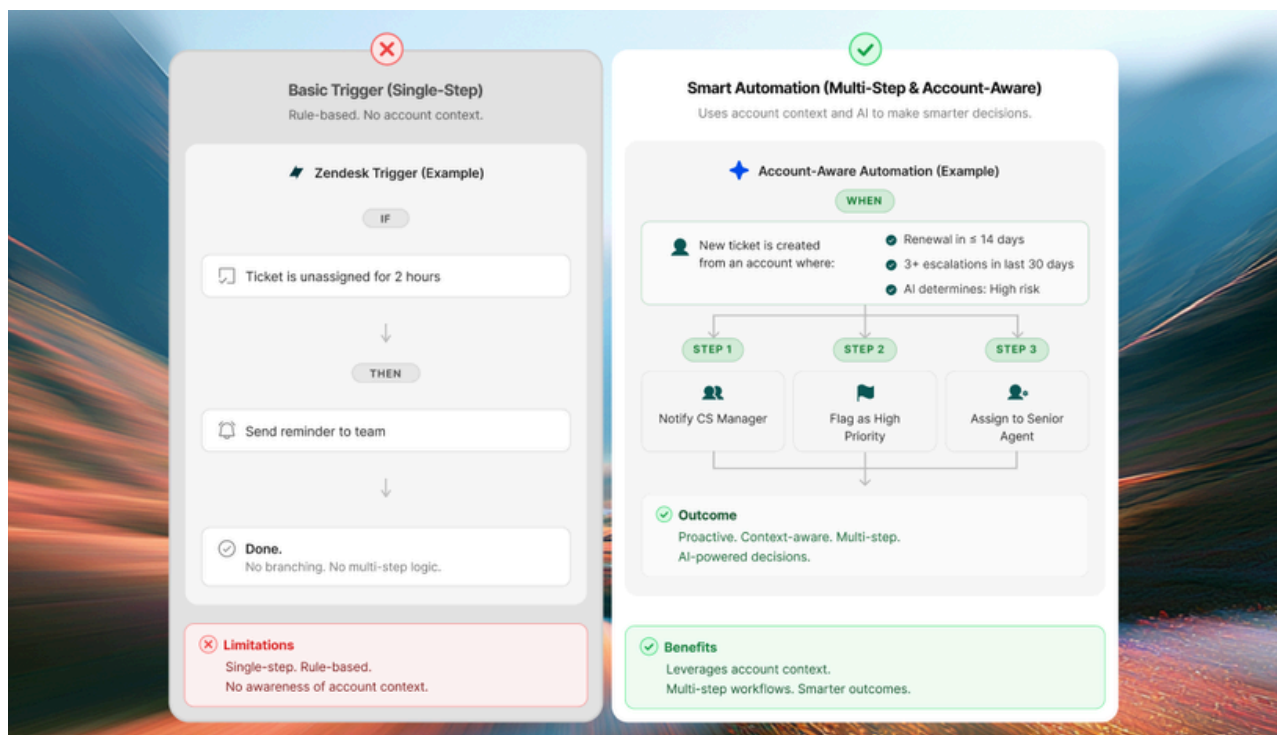
Complex support workflows don't work this way. They need branching logic, conditional paths, AI nodes that can read intent or sentiment, and the ability to pull in data from other systems before deciding what to do next.

Consider this example:

A billing dispute comes in from an enterprise account. The right response depends on the dispute amount, the account's tier, and whether the customer's tone signals they're about to churn.

- High-value account, frustrated tone, above a certain amount: escalate to finance and loop in the CS manager.
- Low amount, neutral tone: refund automatically. That's branching logic based on multiple conditions evaluated together, not a single if-then rule.

Or lets say a customer reports that a core feature has stopped working. Resolving this well means reading the intent behind the message, creating a Jira ticket for engineering, notifying the account's CS manager, sending the customer an acknowledgment with an SLA commitment, and assigning the conversation to a senior agent, all in one flow. A simple trigger can fire an action. It can't chain five actions together based on a judgment call.



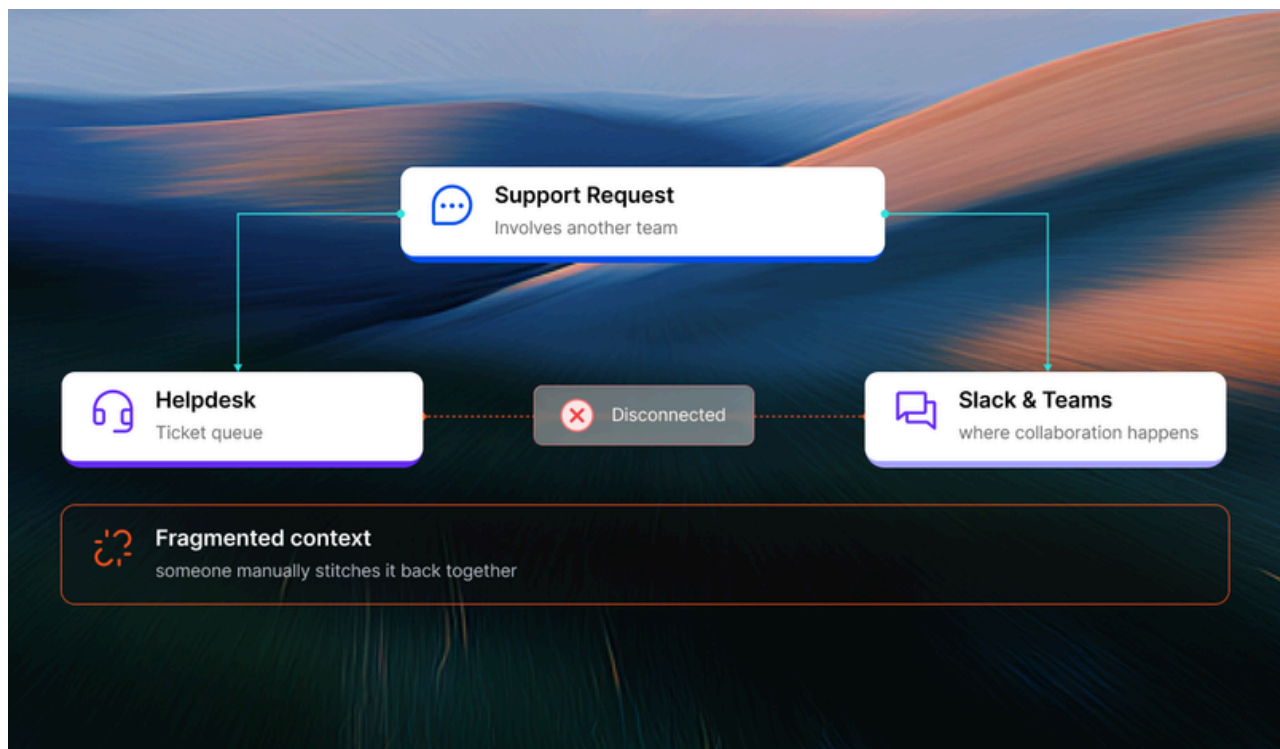
Most helpdesk automations are trigger-based and have no AI or account context layered in

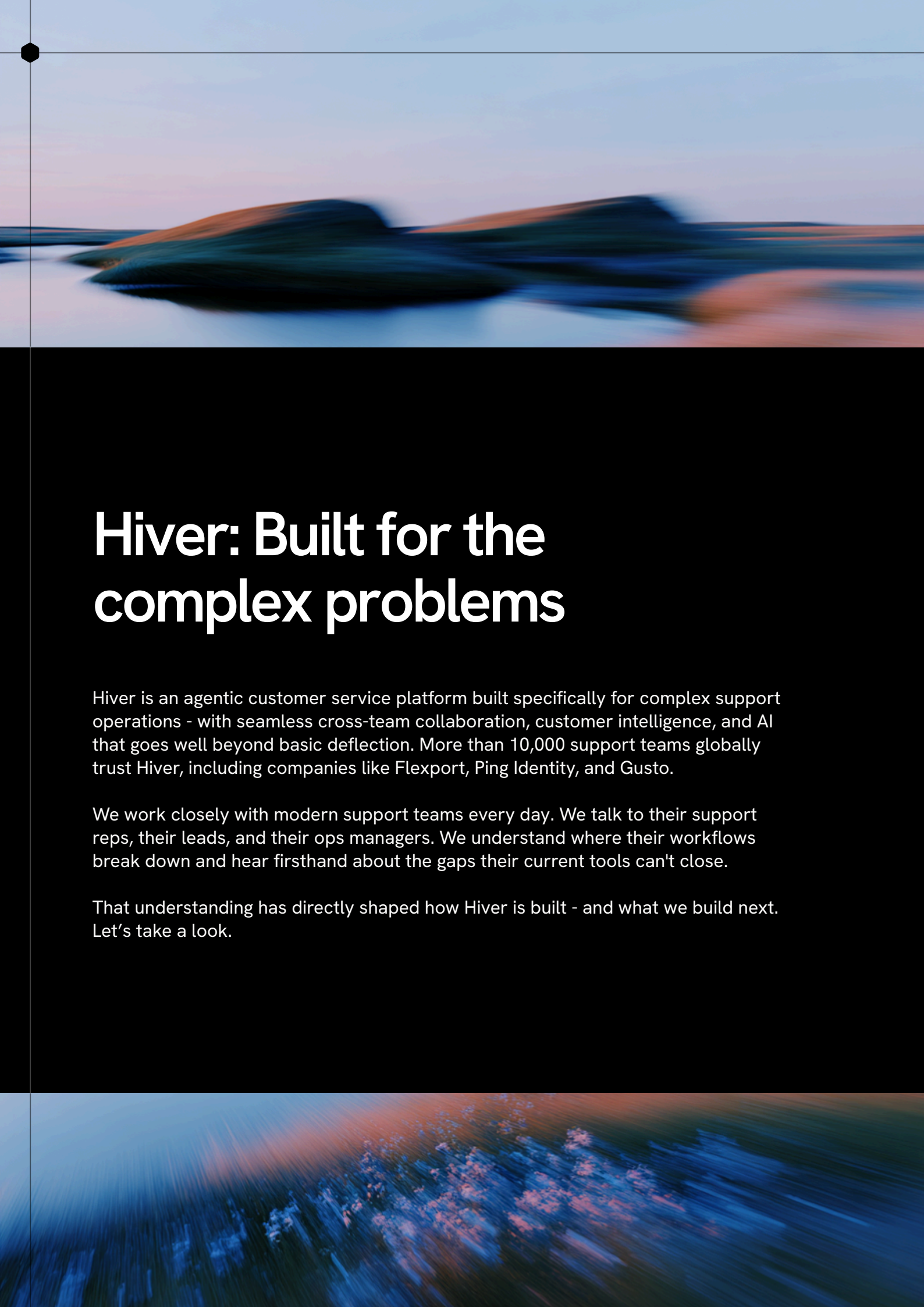
E) Your helpdesk is disconnected from Slack and Teams, where real collaboration happens

Support requests often involve more than one team, especially for teams with complex workflows. Think a SaaS operation or an enterprise business.

A bug report needs engineering. A billing dispute needs finance. A struggling account needs customer success. And when support needs to loop in one of these teams, they don't open a shared queue. They open Slack or Teams.

That's where the real conversation happens: pulling in an engineer to confirm a bug, asking finance to check a refund, tagging customer success on a renewal risk. Most helpdesks were never built for this, and hence, teams end up working around the gap. Someone copies ticket details into a Slack thread. Someone else replies in Slack with the answer, then has to go paste it back into the ticket. Context splits across two tools, and someone has to manually stitch it back together every time.





Hiver: Built for the complex problems

Hiver is an agentic customer service platform built specifically for complex support operations - with seamless cross-team collaboration, customer intelligence, and AI that goes well beyond basic deflection. More than 10,000 support teams globally trust Hiver, including companies like Flexport, Ping Identity, and Gusto.

We work closely with modern support teams every day. We talk to their support reps, their leads, and their ops managers. We understand where their workflows break down and hear firsthand about the gaps their current tools can't close.

That understanding has directly shaped how Hiver is built - and what we build next. Let's take a look.

💡 AI built for complex requests, not just deflection

Hiver's AI is built to go beyond deflection, and solve complex, multi-step problems end to end. Hiver's AI Agents connect to your knowledge base, your internal docs, and your systems of record pull the right information, and respond accurately without a human in the loop. They can handle the really hard problems that span multiple tools and require multiple steps.

If however, a customer wants a human representative, Hiver AI hands off the request with full context so no detail gets lost. Then the AI Copilot works alongside your reps in real time as a coworker, drafting replies, suggesting the next best action, and auditing every response for quality before it goes out.

The screenshot displays the Hiver AI interface within a Slack channel named 'Brex'. On the left, a chat window shows a customer asking, 'Can you refund my order?'. The AI agent responds: 'Of course. I found order #4821 for \$148.00. Shall I process a full refund?'. The user replies, 'Yes, please.'. Below the chat, a section titled '> 5 activities' shows the AI's actions: 'Done. I've refunded \$148.00 to the original card. A confirmation has been sent to kim.harper@gmail.com.'. At the bottom of the chat is an 'Ask AI' button. On the right, a 'CHANNELS' sidebar shows icons for various tools. A 'Refund Resolution is running' status bar is active. Below it, a list of tasks is shown: 'Find the # invoice number in NetSuite', 'Check the customer tier in Salesforce', 'Check the refund policy in Refund Policy.pdf', 'Issue a refund of the \$ amount in Stripe', 'Send confirmation to contact.email', and 'Tag Refund request and mark Resolved'.

Hiver AI solves multi-steps problem end-to-end



Knowledge that stays current and actually powers AI

AI is only as good as the knowledge behind it. And that knowledge lives everywhere: Notion, Confluence, your help center, a macro someone wrote three product versions ago.

Every one of those articles however, is brittle. It's accurate right up until a policy changes, a feature ships, or a process moves, and then quietly wrong from that moment on. Since AI draws from the same content, stale documentation doesn't just slow your team down; it causes AI to give wrong answers confidently to your customers.

Hiver's AI fixes that. It continuously scans incoming conversations, identifies recurring themes, and flags areas where documentation is thin or missing. When a gap is identified, Hiver drafts articles using the content from resolved ticket history.

When new content is added, AI checks for duplicates before it's saved. Agents and AI can both flag articles that are no longer accurate, and those items surface in the Knowledge Gap view for follow-up.

With Hiver, your knowledge always stays up to date, so your support reps and AI can both take the best, most accurate actions.

SUPPORT CONVERSATIONS

How do I reset my password?
7 tickets - Account access

Updating

How do I provision SSO for a new workspace?
5 tickets - Admin & security

Gap

How do I enable two-factor authentication?
4 tickets - Admin & security

Gap

How do I export my billing history?
3 tickets - Billing

Gap

How do I add a teammate to my plan?
3 tickets - Account access

Gap

AGENTIC KNOWLEDGE BASE

AI scanned past tickets and updated these articles

"How do I reset my password?"
updated in Notion

Done

"How do I provision SSO for a new workspace?"
updated in Confluence

Done

Synced in real time

Notion

Confluence

Google Drive

Asana

PDF

Google Sheets

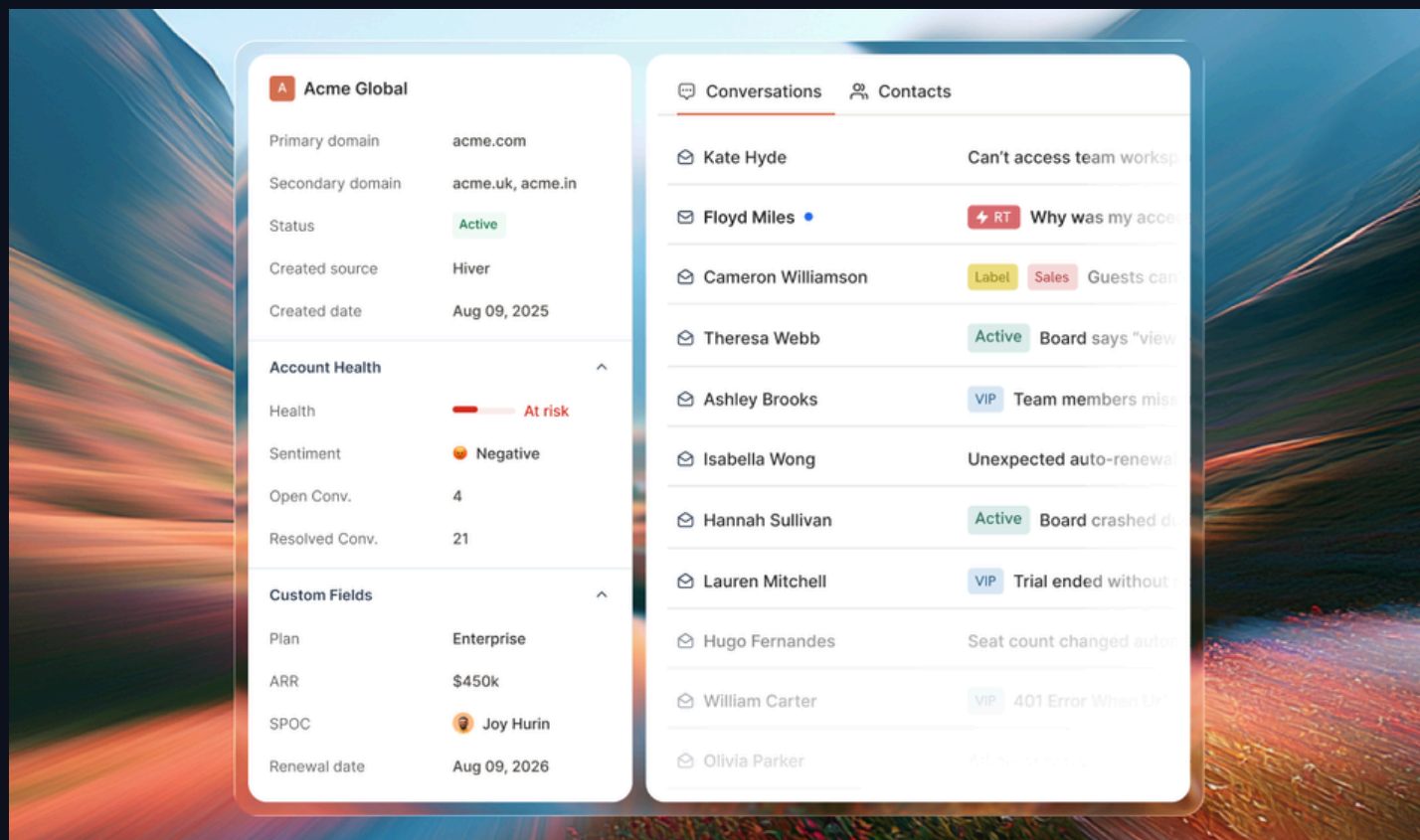
Hiver surfaces knowledge gaps automatically and drafts articles for you

Relevant customer intelligence, not just conversation history

Hiver builds a living picture of the account: health, sentiment, and full context from every touchpoint. Conversations, ticket volume, product usage, call transcripts, and any rule you define. AI catches sentiment drops across tickets, calls, and emails. It flags the account as at risk, alerting admins the moment those tickets arrive with custom SLAs applied. When a customer mentions a new team, a new department, or a new use case, the expansion signal reaches sales in real time.

The scores explain themselves. An AI summary draws on conversations and CRM data to account for why health sits where it does, so you fix the root cause instead of chasing the symptom. Ask AI covers the rest: what changed, when, and why. Open the account, and you can see which users are raising issues, how sentiment and health have shifted over months, and what your team has already tried.

You can build workflows to set up alerting and trigger cross-tool updates. Health below 60 triggers a tailored SLA and Slack alert. A sentiment drop notifies the CSM. An expansion signal routes the lead to sales and creates a task in your CRM. From one-step alerts to multi-team handoffs, the playbooks go as deep as the situation needs.



The screenshot displays the Hiver interface for an account named 'Acme Global'. The left sidebar shows account details and health metrics, while the right pane lists contacts with their current status and issues.

Acme Global	
Primary domain	acme.com
Secondary domain	acme.uk, acme.in
Status	Active
Created source	Hiver
Created date	Aug 09, 2025
Account Health	
Health	At risk
Sentiment	Negative
Open Conv.	4
Resolved Conv.	21
Custom Fields	
Plan	Enterprise
ARR	\$450k
SPOC	Joy Hurin
Renewal date	Aug 09, 2026

Conversations	
Kate Hyde	Can't access team worksp...
Floyd Miles	Why was my acces...
Cameron Williamson	Label Sales Guests can...
Theresa Webb	Active Board says "view...
Ashley Brooks	VIP Team members miss...
Isabella Wong	Unexpected auto-renewal...
Hannah Sullivan	Active Board crashed d...
Lauren Mitchell	VIP Trial ended without...
Hugo Fernandes	Seat count changed auto...
William Carter	VIP 401 Error When Up...
Olivia Parker	Alt...

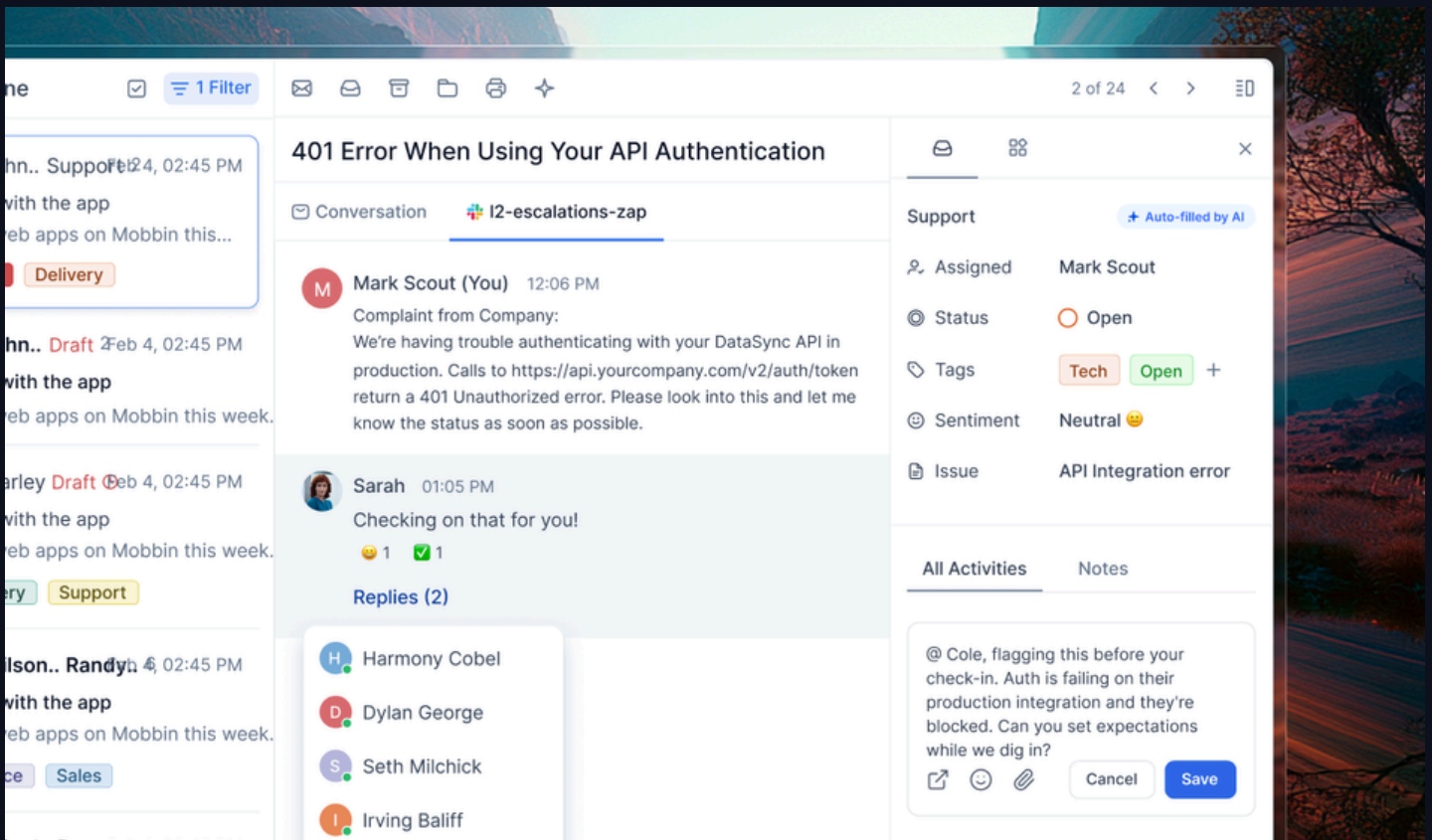
Hiver surfaces everything an agent needs to know about an account, without leaving the conversation

Collaboration across Slack and Teams, without leaving the conversation

Often, a ticket that starts in the support queue needs a CS manager's input, a finance team's approval, or an engineering fix before it's resolved. Most teams handle this by switching to Slack, pasting in the ticket context, and then copying the answer back once someone replies. The conversation and the resolution end up living in two different places.

In Hiver, agents can create a Slack thread directly from the email conversation, without leaving it. The thread carries the original message and relevant context, so the CS manager, finance approver, or engineer sees exactly what they need without a summary or a screenshot. Replies in Slack sync back into the conversation automatically, so nothing has to be manually copied over.

Reps can also leave private notes visible only to teammates, so context builds up inside the thread itself instead of scattering across separate Slack channels or a verbal briefing. For work that needs action in another system, Hiver's integrations with Salesforce, Jira, and Linear let reps create a case or log a bug directly from the thread, with updates syncing back in real time. But the collaboration itself, the back-and-forth that gets a ticket resolved, happens on Slack, right where the conversation already is.



Bring every Slack support request directly into your helpdesk queue

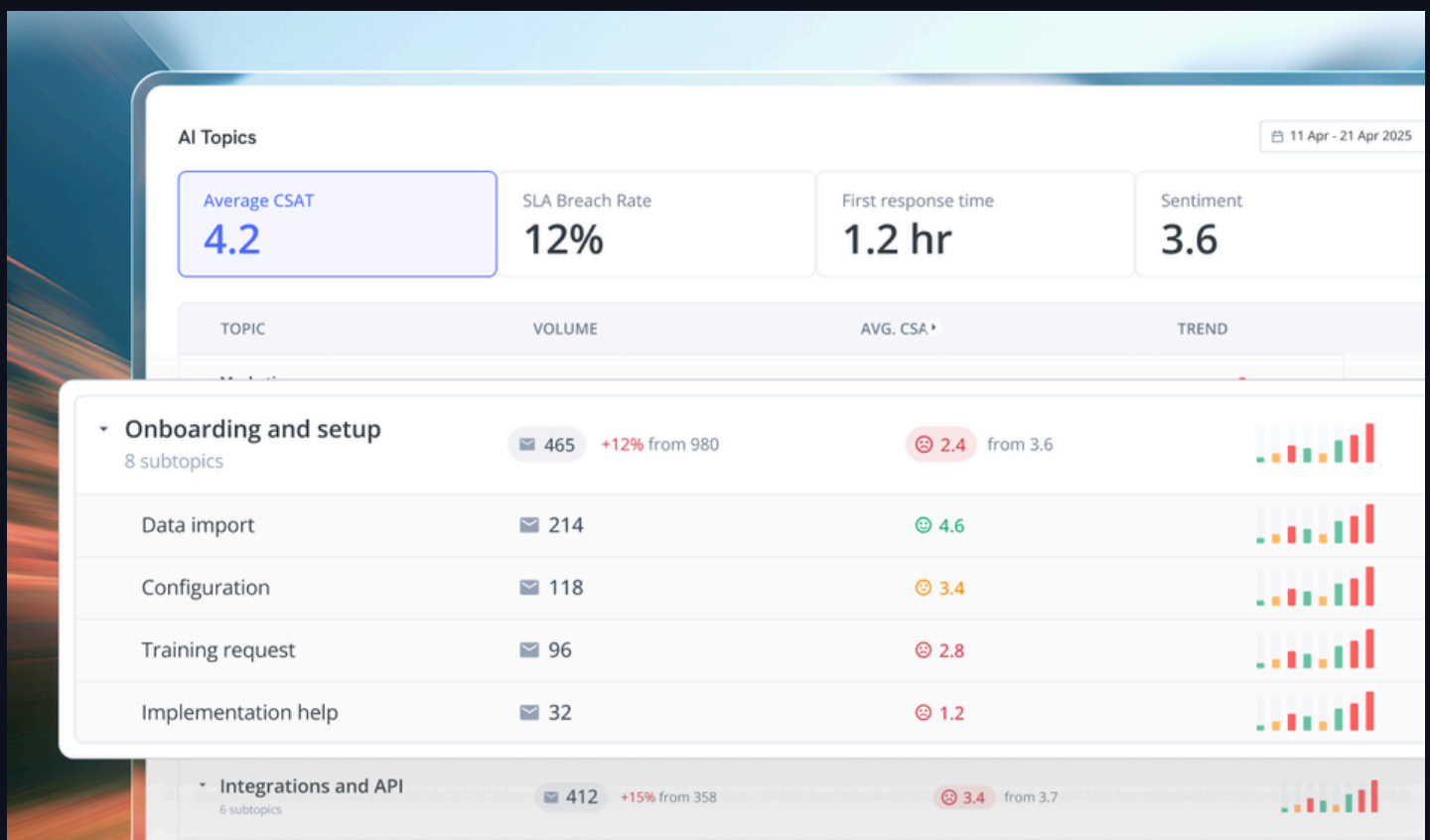
AI-powered support analytics

Most support dashboards stop at ticket volume, first response time, resolution time, and CSAT. Those numbers tell you support got busier. They don't tell you why, or what to do next.

Hiver's AI Insights groups incoming conversations by topic automatically, so you see what's actually driving ticket volume: billing questions spiking one week, a product issue generating repeat contacts, a policy change customers weren't told enough about. Each topic carries its own response time, resolution time, and CSAT, so a manager isn't just told refund requests exist. They're told refund tickets are running below the team's average CSAT, and where the coaching gap is.

AI also reads the tone of every conversation and tracks sentiment across the queue over time, not just per ticket, so a team catches frustration building before it shows up in a survey or a churned account.

Additionally, instead of a manager sampling ten conversations a week for QA, AI QA scores every single reply your team sends against the rubric you define, then rolls it up into scorecards tied to CSAT.



Hiver AI sorts tickets by topics, so you know what's driving ticket volume

Final word

Good support is measured in accounts retained, escalations caught early, and customers who feel like your team actually understands their situation. Most support infrastructure isn't built to meet that bar.

The teams that consistently get it right share one thing: their tools reflect how complex support actually works. Getting there starts with recognizing that the infrastructure underneath your support operation is either working for you or against you.

"With Hiver, we have much better visibility across support conversations. Trying to achieve this level of collaboration without it would be impossible."

Nathan Strang

Ocean Freight Operations Manager

flexport.



"Zendesk never fit our team's needs. We needed a system built for relationships. Every improvement we made with Hiver strengthened how our team operates."

Wes Gibson

Revenue Operations Manager

 **bynder**



"I get visibility into the volume of emails, and the types of issues. I can now ensure that operational tasks are accomplished faster."

Dana Madlem

Vice President Services

 **RUSH ORDER**
RELIABLE FREIGHT/LUMBER SOURCES





Agentic AI support built for complexity

[Book a demo](#)

