

GUIDE

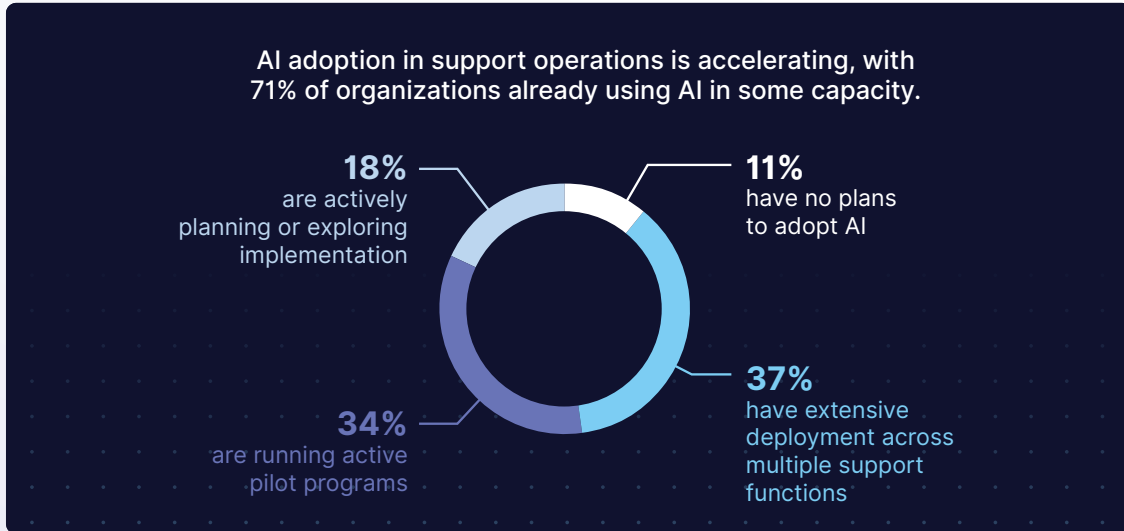
The Help Desk AI Maturity Journey:

A Support Team's Guide To Go
From AI Experiments To Results

Deskpro

Introduction

Feeling behind on AI adoption in employee or customer support? You're actually right where most teams are. According to a recent **Deskpro survey** of over 220 support and IT leaders, only 37% of organizations say they have deployed some level of AI across multiple support functions, while 52% are still in the initial planning or pilot stages (and 11% aren't using AI in support at all).



Most organizations are struggling to get past the pilot stage: **an MIT study** found that 95% of all generative AI pilots fail. Pilots may stall or get pulled back for a number of reasons, including:

- Security and compliance requirements
- Lack of clarity around objectives and outcomes
- Use of generic tools with limited value (especially for support use cases)
- Insufficient change management

Support teams know help desk AI has the potential to improve operational efficiency, reduce resolution time, increase self-service adoption, and enhance customer satisfaction—but they're struggling to reach the level of AI maturity that will allow them to achieve those outcomes.

The good news is that wherever you are on your AI journey, it's possible to achieve meaningful results by taking a step-by-step approach to advancing your maturity.

In other words, you don't need to deploy autonomous AI agents across every channel overnight. You can start by setting a strong AI foundation, piloting a single use case to prove value, rolling out limited features to production, and expanding based on your learnings.

In this guide, we'll walk through the core help desk AI use cases to start exploring, what different levels of AI maturity look like, and how to keep moving forward.

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Understanding What You Can Achieve With Help Desk AI

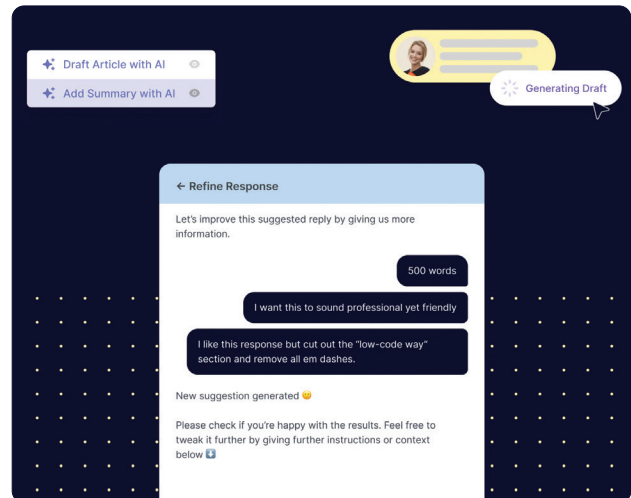
Before you can advance your AI maturity, it's important to have a basic understanding of what you can do with help desk AI and how it adds value. Below are the three primary applications:

Agent Assist

Agent assist, often referred to as “copilot,” features use AI to help agents work more efficiently: summarizing tickets, drafting suggested responses, retrieving answers from indexed content.

Key Benefits:

- **Time savings**—Agents spend less time on administrative tasks and repetitive queries, giving them more time to spend on more complex issues and high-value activities.
- **Reduced agent stress**—Agent assist features reduce the cognitive load, providing agents with information they would otherwise have to search for and helping them quickly make sense of lengthy tickets.
- **Reduced time to first response and resolution**—By helping agents draft responses and retrieving relevant guidance from help center or knowledge base articles, agent assist features reduce the time to respond and resolve customer or employee issues.

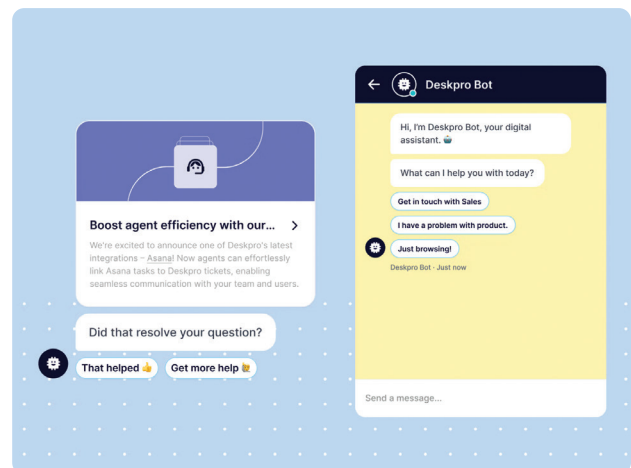


Chatbots

AI chatbots go beyond the rule-based bots that have existed for years. Rather than relying primarily on pre-programmed logic and rigid scripts, AI chatbots analyze natural language inputs from users and generate responses dynamically. When connected to data sources such as help center articles or product manuals, chatbots can reference those sources to inform their responses.

Key Benefits:

- **Ticket deflection**—The more issues a chatbot can resolve on its own, the fewer issues get elevated to a human agent, reducing operating costs for the support team.
- **Improved self-service experience**—An AI chatbot connected to relevant data sources provides a better self-service experience than a limited rule-based bot or FAQ page. Chatbots can also provide language translation in real time, enabling more customers or employees to get what they need without contacting support.
- **24/7 support**—Chatbots operate around the clock, helping businesses better serve customers or employees in different regions.



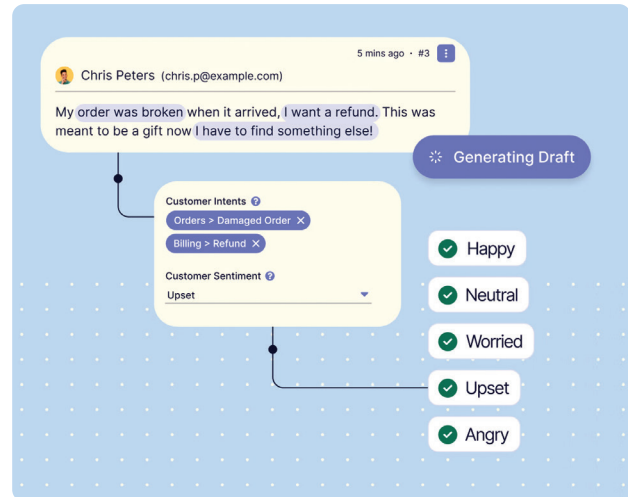


Automation

Support teams can use AI-powered automation alongside rule-based triggers to improve queue management. Sentiment analysis and intent detection features help classify and route tickets to the best-fit team and agent.

Key Benefits:

- **Time savings**—Automation eliminates previously manual queue management tasks.
- **Intelligent routing**—By analyzing sentiment and intent, AI directs each ticket to the person or team best-suited to address the issue.
- **Increased customer or employee satisfaction**—With intelligent routing, customers or employees are more likely to have their issue resolved on first contact, increasing their satisfaction.





The AI Maturity Spectrum

No support organization goes from zero AI to fully autonomous agents instantly. In conversations with support leaders, we typically see organizations falling into one of three levels on the AI maturity spectrum:

	Level 1: Organized Support	Level 2: Strategic Support	Level 3: Intelligent Support
What's In Place	• Basic ticketing system • Rule-based automation • Tools for team collaboration	• At least one AI feature piloted and deployed • Multichannel orchestration (unified inbox across channels) • Proactive support workflows	• AI rolled out across multiple support functions and all channels • Continuous optimization • Human-AI collaboration
AI Introduced	• Agent assist • Chatbot	• Sentiment analysis and intent detection • Automated triage	• Predictive analytics • Omnichannel AI agents • Chatbot with intelligent routing
Integrations	Knowledge base	Indexed public content (PDFs, manuals, help center content, etc.)	Enterprise systems and data
In Pilot or Deployed	Pilot	Both (some AI functionality deployed, additional features in pilot)	Deployed
Outcome Focus	Time savings	End-user experience optimization	Enhanced operations across all channels

In a series of roundtables, the majority of support leaders we spoke to ranked their organizations at the Level 1 stage of AI maturity. Most of those who ranked themselves at level 2 said they were still in pilot, and no one said they were running AI at scale.

If your organization is at Level 1, you're not as far behind with AI as you think you are—but you probably still want to advance. In the next sections, we'll break down best practices to help you move from one level to the next, taking you from AI experimentation to real results.



Level 1: What To Do When You're Just Getting Started With AI

AI Introduced:

- Agent assist
- Chatbot

Status: In Pilot

Outcome Focus:
Time savings

Define What You Want To Achieve

Avoid adopting AI for AI's sake: start with a key outcome you want to achieve and decide what success looks like. Your exact KPIs will depend on your use case and organizational goals, but some common examples we see in the help desk space include the percentage of tickets deflected using a chatbot, reduction in time to assign a ticket, and reductions in first response and overall resolution time.

Get Security and Compliance Buy-In

Your AI project won't get far without buy-in from your security and compliance teams. In Deskpro's survey, 81% of respondents rated security as either "very important" or "critical" when evaluating support technology, and 43% said they would not proceed with a purchase without strong security guarantees.

Bring your security and compliance teams into the evaluation process to ensure the solutions you're vetting meet all your organization's security requirements and any relevant data privacy regulations. Discuss where customer data will be processed, how it's stored, who can access it, and what happens if you need to revoke access. Document agreements on acceptable use cases, data handling procedures, and audit capabilities.

Map Your Help Desk Data

Inventory your data: help center articles, ticket histories, internal runbooks, customer profiles, conversation transcripts, resolution documentation, and so on. Identify data sensitivity levels, including what's public, what's internal-only, and what contains customer PII, to determine what AI can safely index.

Plan for Regional Requirements and Industry Regulations

Map where your customers are located and what regulations apply to their data. If you support EU customers, you need to comply with GDPR. If you handle US healthcare inquiries, you need HIPAA controls.

Regional and industry regulations may impact how you deploy your help desk AI. If you're in a highly regulated industry, you may be prohibited from using foundation AI model services operated in the public cloud, meaning you'll need to look for help desk AI solutions that can be deployed in a virtual private cloud (or on-premise, if your organization operates its own data centers). If you're in a region with strict data sovereignty requirements, you'll need to look for a solution that can be deployed in the sovereign cloud for your region.

Document Roles and Responsibilities

Identify who will be responsible for what during the pilot phase, including who will manage the program, monitor for compliance, evaluate data quality, and review escalated incidents.

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Level 2: What To Do To Move From Pilot To Production

AI Introduced:

- Sentiment analysis and intent detection
- Automated triage

Status: In Pilot and Deployed

Outcome Focus:
Enhanced operations across all channels

Index Your Public Content

Your AI capabilities can only go so far if you don't connect content from your organization, such as help center articles, guides, and manuals. Without these data sources, you'll get generic outputs with limited usefulness for your customers or employees.

Start by indexing public-facing support content. Because this content doesn't contain proprietary information or sensitive data, it gives you a low-risk way to start testing an AI chatbot or retrieval-augmented generation (RAG).

Add Internal Support Use Cases

Launch your first AI pilot with internal support teams, such as HR support, or facilities management. These environments let you test AI assistance with lower compliance risk. Agents can search internal knowledge bases, get suggested responses for common IT/HR issues, and automate ticket routing. Once internal teams prove the value of AI, expand to customer-facing support.

Define Your Exit Criteria

Decide what thresholds your AI solution needs to hit to make a go/no-go decision on moving to production. You may set criteria related to both model accuracy and the KPIs you identified during the planning phase.

Educate Your Support Team

Help support agents understand what AI does in your help desk environment. Show them how AI suggestions work, when to use them, and when to rely on their own judgment. Address job security concerns directly by outlining how AI handles repetitive questions, so agents can deal with complex issues that require human empathy and expertise.

Forecast the Budget

Moving from pilot to production typically means increased costs due to the additional compute resources, licenses, and ongoing monitoring and maintenance. Work with your IT and finance teams to understand the additional costs and forecast the budget so there are no last-minute surprises.



Level 3: What To Do After Your Initial Deployment To Ensure Success

AI Introduced:

- Predictive analytics
- Omnichannel AI agents
- Chatbot with intelligent routing

Status: Deployed

Outcome Focus: Enhanced operations across all channels

Scale Beyond Your Initial Use Case

If you started with a narrow scope during your pilot, this is your chance to expand to different teams, use cases, or AI feature sets. Keep in mind you don't need to take an everything-all-at-once approach. You might gradually roll your AI solution out to different support teams or wait until you see success with one objective (e.g., using help desk AI to improve time to assign a ticket) before introducing new features to pursue another objective.

Index Additional Data Sources

Identify additional data sources, such as ticket histories, knowledge bases, and website content, that you can securely connect to your AI to improve your outputs. Work with your security team to determine what you can safely connect based on the data sensitivity level, industry regulations, and your AI deployment type. For example, if you're in a highly regulated industry, you might be able to connect customer data sources to an AI model deployed in a virtual private cloud but not the public cloud.

Continue Monitoring and Measuring KPIs

Continue tracking the KPIs you set during the planning phase—and introduce others as needed to support new objectives as you scale. Set up dashboards to track progress and quantify your ROI. This will help you make the case for ongoing investment in your AI initiative.

Establish a Content Feedback Loop

Review tickets or chatbot transcripts where your AI solution couldn't resolve a customer issue and escalated it to a human agent. Use this information to prioritize the content you need to create and use to tune the model so that it can successfully resolve these issues the next time they come up.

Work With Security and Compliance Teams for Ongoing Compliance

Assign a named owner or small working group responsible for AI governance within the organization. This person or group should meet with stakeholders from your security, legal, compliance, and IT teams at regular intervals to review model changes, new data sources, expanded use cases, and any policy changes.



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Moving Forward On Your AI Journey

AI adoption in support operations isn't a race to implement the shiniest new features. The organizations finding success are the ones that take a purposeful approach: they start with a clear use case and objective, work with compliance and security teams to avoid project shutdowns, start small with a pilot, prove the value, and scale gradually. They use performance insights to continuously improve their AI, indexing new content and delivering better outputs to employees and customers.

One final note: you don't have to go on your AI journey alone. Partner with a vendor who will set you up for success—allowing you to use your organization's AI model of choice, deploy in the environment that's best for your business, and keep outputs consistent, accurate, and grounded in your approved sources. A trusted partner can help you remove the barriers that frequently stall AI pilots, enabling you to put AI to practical use and see the benefits to your customer and employee experience.



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About Deskpro

Deskpro is the developer of AI-driven help desk software that empowers organizations worldwide to deliver exceptional customer and employee experiences that translate directly into tangible ROI, through improved customer and agent retention. Deskpro is the only help desk platform with enterprise-grade security, compliance, and data privacy, enabling all organizations to adopt and deploy AI, even in the most regulated industries and sovereign environments. Deskpro is available as a cloud service, and can also be deployed in VPCs, on-premise, private clouds, and sovereign clouds. Trusted by leading enterprises worldwide in banking, technology, financial services, healthcare systems, aerospace and defense, as well as government agencies, Deskpro is led by experts in enterprise software, customer experience, and customer support. Learn more at deskpro.com.