thread

Onboarding Schedule

Week 1
- Training 1: **Thread Overview + Customer Chat Experience** (Tuesday 3pm ET)
- Roundtable + QA Call (Wednesday 2pm ET)
- Training 2: **Workflows, Automation, and AI** (Thursday 3pm ET)

Week 2
- Training 3: **Customer Rollout** (Tuesday 3pm ET)
- Roundtable + QA Call (Wednesday 2pm ET)
- Training 4: **Service Team Training** (Thursday 3pm ET)

Let's make service magic together! ✨

thread

Training #2:
Workflows, Automation, and AI

Amanda Swanson & Kelly Schwarz

Customer Success Managers

Let's make service magic together! ✨

thread

Today's Agenda

- Learn how to set up channels and automation in Thread Inbox to suit your team's service workflow

- Activate and test Thread's AI Service CoPilot Auto-Prioritization

- Test Thread's AI Service CoPilot Time Entries

- Looking forward to customer chat rollout on Tuesday
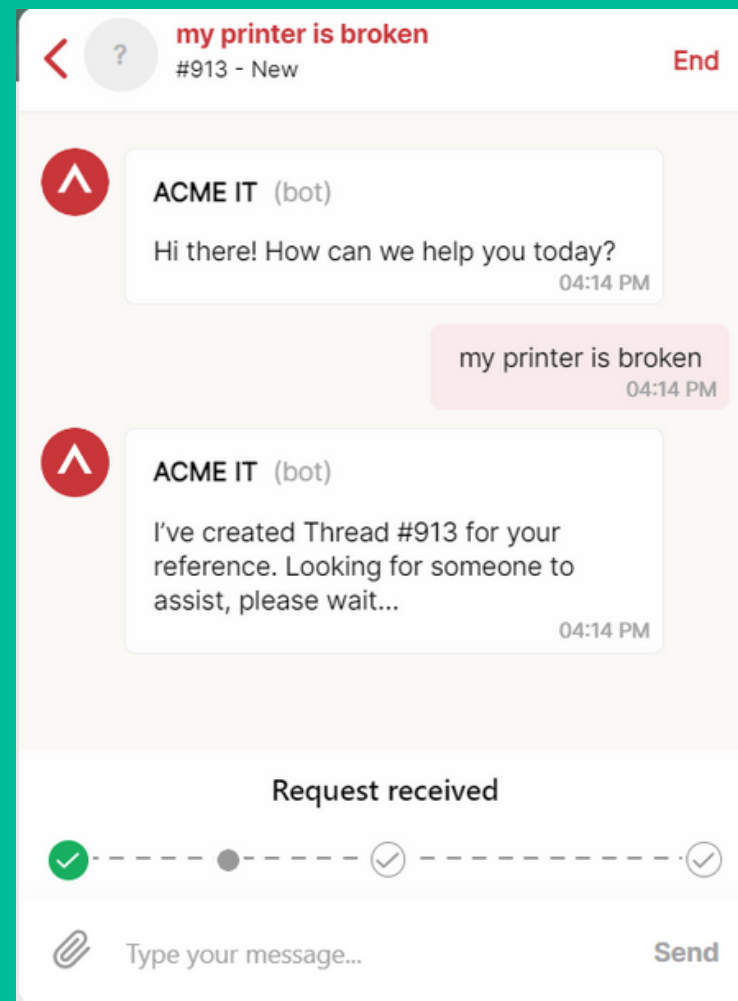
*You will need:

- admin access to Thread

Let's make service magic together! ✨
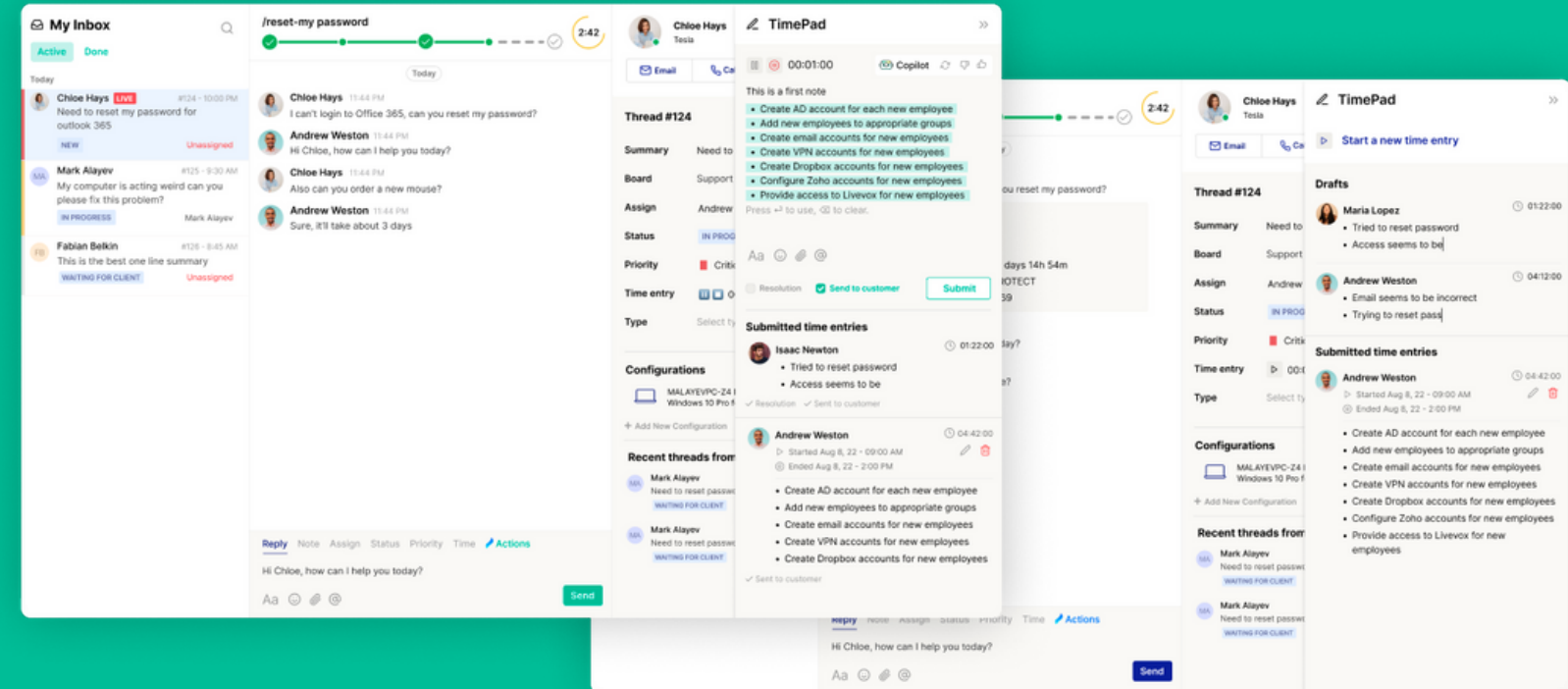
Thread Overview

Customer-facing:

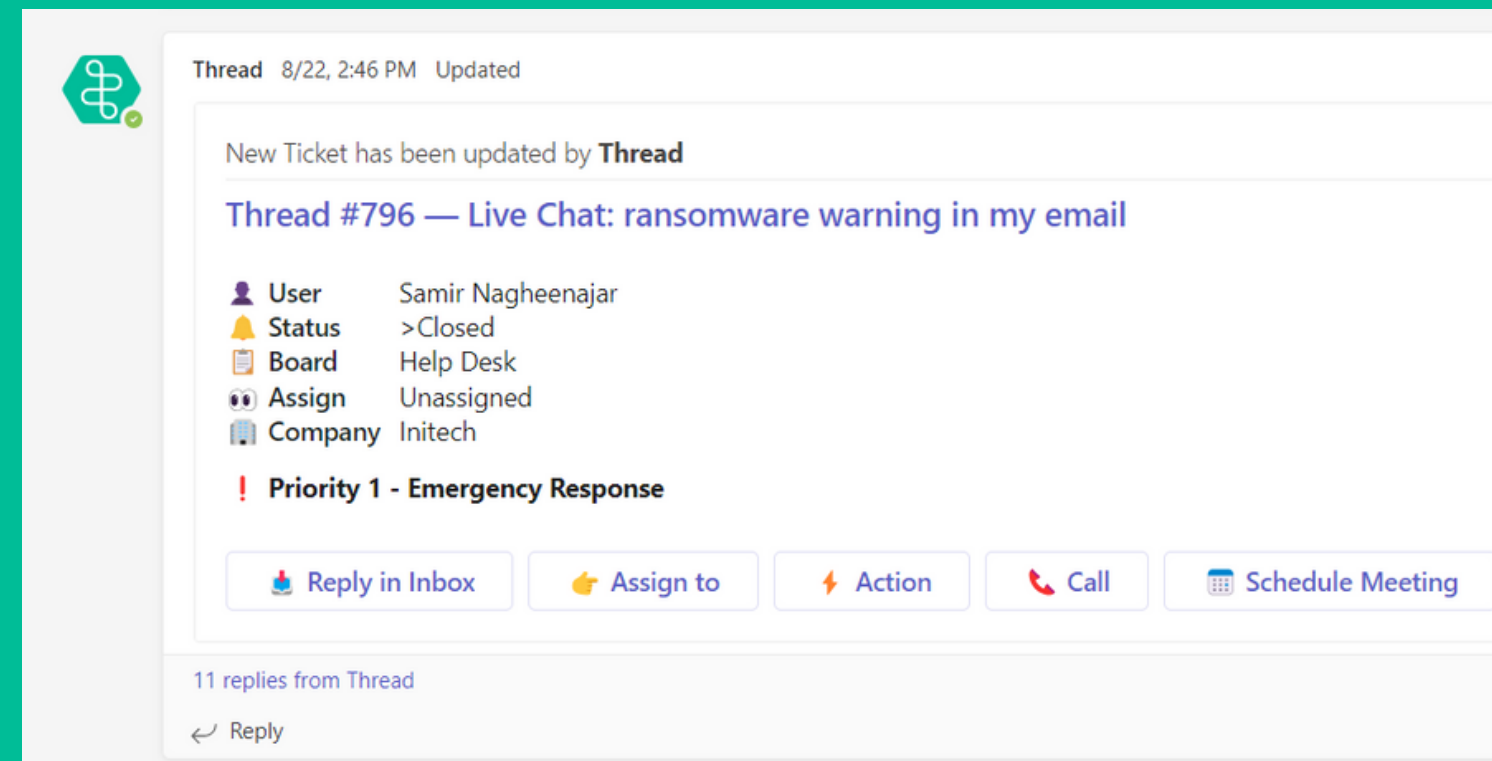### Messenger Service Chat Apps

- Teams
- Slack
- CloudRadial
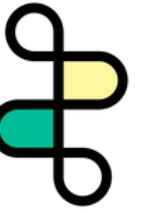- Desktop
- Web

Internal-facing:

1) Inbox

### 2) Teams/Slack Integration ("Companion App")

Thread Inbox

- Bi-directional sync with your PSA

- You can respond to Thread chats and other tickets from both Inbox and PSA, but we think you'll prefer Inbox because it is a **real-time** platform

- Inbox also offers additional streamlining and automation your service team will love

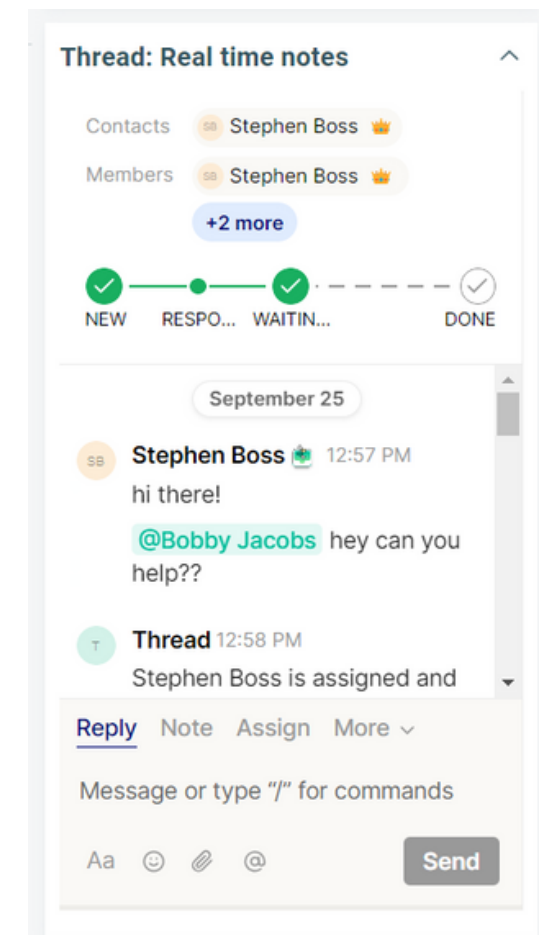- Available via **web**, **desktop**, and now **inside your PSA**!

Inbox (Web/Desktop)
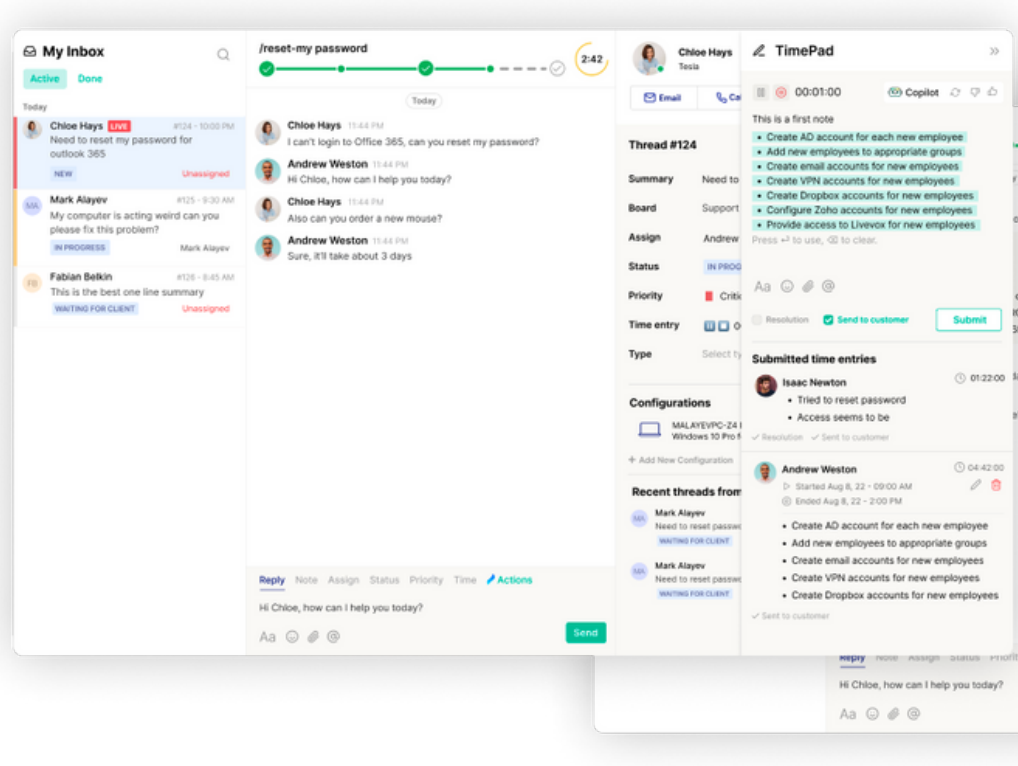
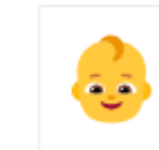## ConnectWise Pods
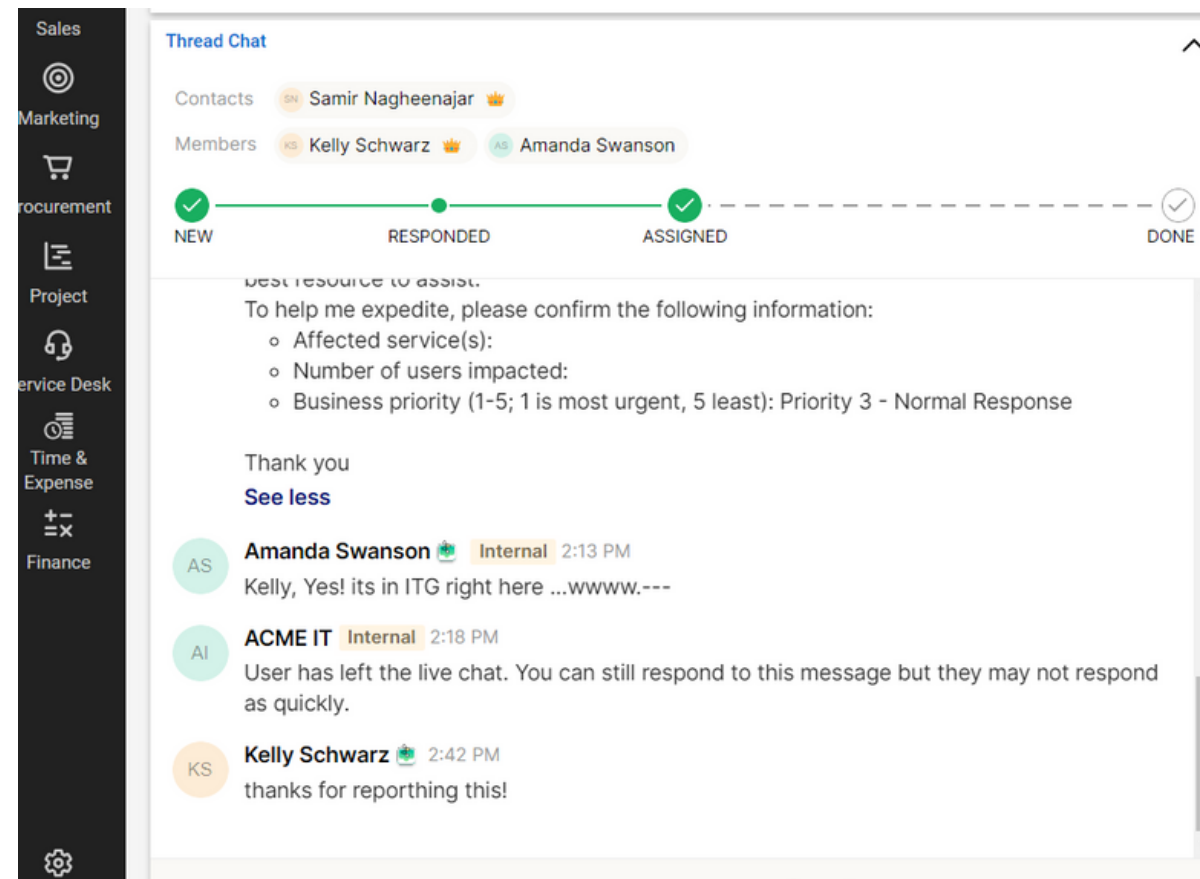
Autotask Insights

Inbox Channels - Overview

- Analogous to "folders" in email

- Linked to highly customizable "Flows"

- All of your service requests-- regardless of source-- can flow into channels

- Threads can exist in multiple channels simultaneously

- Admins invite team members to channels

- All channels contain "Active" (open) and "Done" (closed/completed) columns

- *Channels trigger off of webhooks when you create or update a ticket in PSA — so create a mass internal note if you want to populate tickets in bulk*

Inbox Flows

- Check out our flow Templates:
https://admin.getthread.com/dashboard/templates)

- View/edit existing and create new Flows:
https://admin.getthread.com/dashboard/flows

And/Or Logic, Rules, and Grouping

Where	Status Name	Like		×
AND ∨	Status Name	Like		×
AND	Status Name	Like		×
OR				

+Rule +Group

Filter Options

Status Name ∨	Service Location	Priority
Status Name	Owner	Sub type
Date	Team	Type
Contact Type	Contact	Country
Company Type	Zip	Summary
Time of Day	State	Budget Hours
Day of week	City	Board
Impact	Address Line 2	Site
Severity	Address Line 1	
Agreement	Companies	
Opportunity	Status	
Source		

Inbox Channels - Default vs. Dynamic

Default flow setting -- threads are routed into the channel by flow filter criteria, and then remain in the channel until resolution (once the thread is resolved, it will move to the "Done" column in that channel)

Recommended for:
- any home or main channel for threads that you'd like to monitor and search in one place
- Ex: "All Threads," "All Chats,"

Dynamic flow setting -- threads are routed into the channel by flow filter criteria and then routed out of the channel once they no longer meet the flow filter criteria

Recommended for:
- Status-based channels such as "Triage," "In Progress," etc.
- Priority-based channels

When a new

Ticket

Apply filters

| Where | Status Name | Like | New | × |

+Rule   +Group

Send a message

Inbox Channel

1. Triage

☑ Dynamic Flows
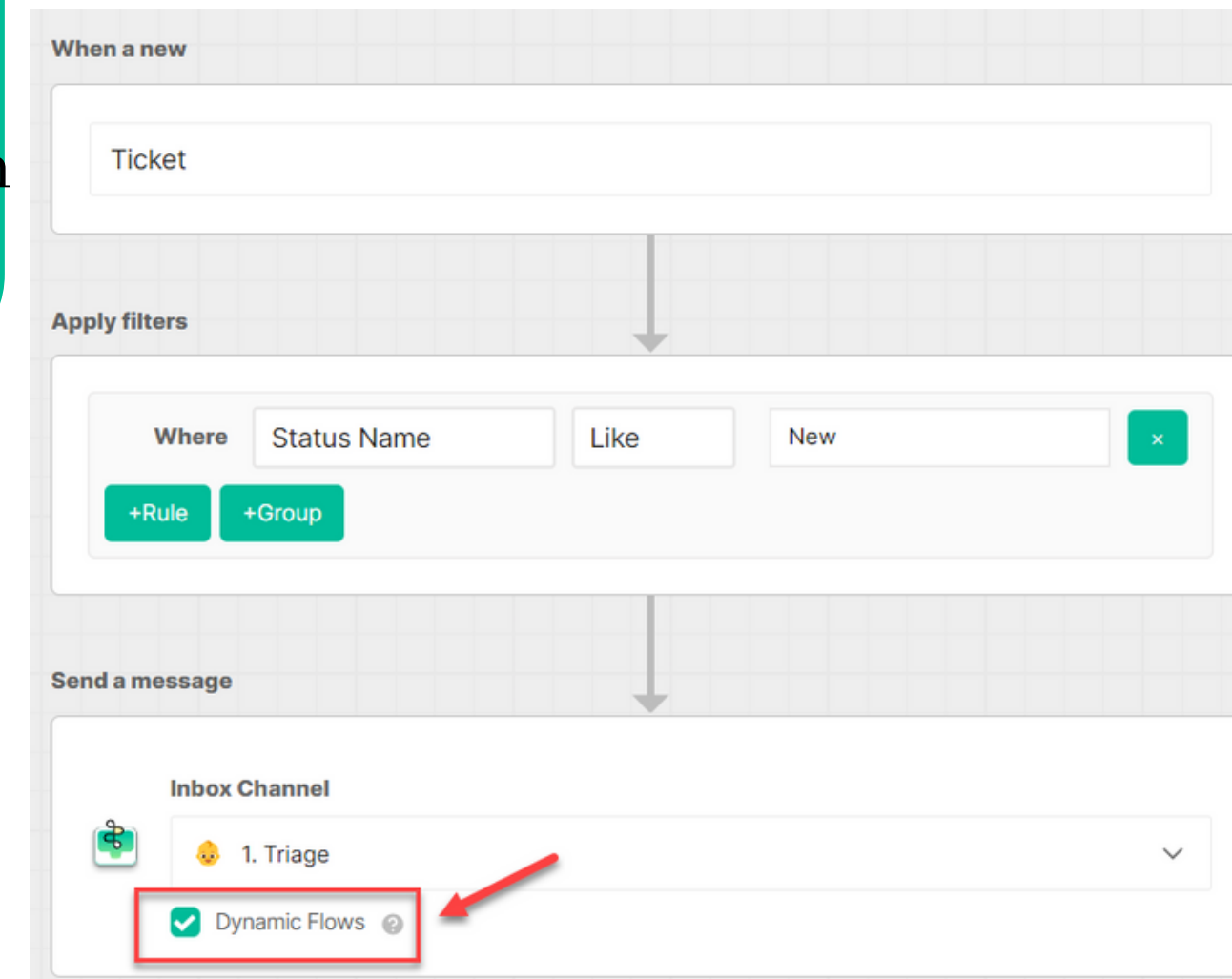
Inbox Channels - Link to Teams/Slack Companion App

- Via flows, you can link Inbox channels to your internal-facing Teams/Slack Companion App

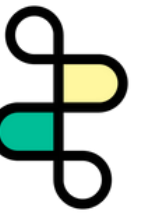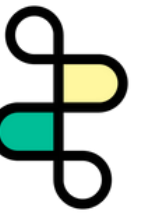- Recommended for:
  - P1 Issues
  - VIP
  - At-risk accounts

Apply filters

Where | Priority | = | Priority 1 - Emergency Response ∨ | ×

+Rule +Group

Send a message

Inbox Channel

🔥 +P1 & P2 ∨

☑ Dynamic Flows ⍰

Team 🗑

ACME Service Desk ∨

Channel

Urgent Issues ∨

☐ Create a new channel for each ticket ⍰

Recommended Inbox Channels - Universal Use Cases

- "All Threads"
  - includes all service requests from all sources & service boards/queues
  - non-dynamic
  - for monitoring and searching all service requests in one place

- "Chat Threads"
  - includes all threads created via chat
  - non-dynamic
  - for viewing and interacting with all chats

- "P1 Threads"
  - all priority 1 threads
  - dynamic -- if the priority changes, the threads will flow out of the channel
  - use Thread's AI Service CoPilot Auto-prioritization
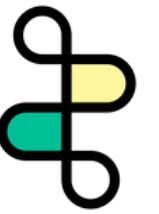
AI Service CoPilot - Auto-prioritization
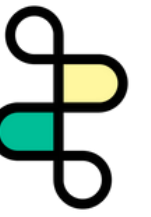
1) Set your priority rules (starter prompts: https://docs.getthread.com/article/hnhksbutjg-starter-prompts-for-service-copilot-auto-prioritization)

2) Configure a flow to enable auto-prioritization

Recommended Inbox Channels

Dispatch/triage model:
- "Triage"
  - includes new service requests
  - dynamic - changing status will cause threads to flow out
- Additional status-based channels
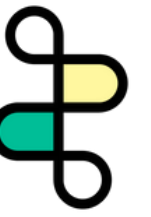 - Ex: "Assigned," "In Progress," etc.

Tiered Model:
- Channels for each tier
- Additional status-based channels
  - Ex: "Escalated"

Pod Model:
- Channels for each pod

Scheduling:
- Channel for scheduled service requests

What to expect as you roll out Thread?

Adding Chat will not increase overall ticket volume.

- Over time, chats tend to displace expensive sources of support, like phone.
- With this change, customers will be happier and your team will see a huge efficiency increase.

In the first weeks, chat volume will be low and will steadily increase.

- As users discover and learn the app, they will adopt Thread more into their workflow when they need support.
- As you deploy to more customers, more users will use it.

Communication is the key to success.

- Let your customers know about the awesome new way they have to collaborate with you.
- Use our email and how-to templates to quickly engage your customers as you rollout.
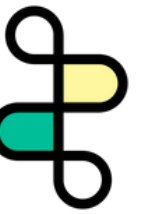
How Thread recommends you
Scale out your Chat Ops

Dedicate a first line tech on your team to be the chat first responder in the first week(s).

- Not enough chats week 1 to justify spinning up your entire service desk on Thread right away.
- They can handle their day job while being really responsive to your first customers chatting in, **your customers will ❤ Thread**.

Use your Chat First Responder to train the rest of your team and build a rotation.

- At this stage, learning is most important. You want to give your designated first responder as much exposure to chat as possible.
- Pick the first line tech best suited to master Thread and have them train up more techs as you continue to roll out to more customers.

HOW do you communicate this change to your customers?

You know your customers best! BUT here are some methods we have to ensure a smooth & transparent roll out.
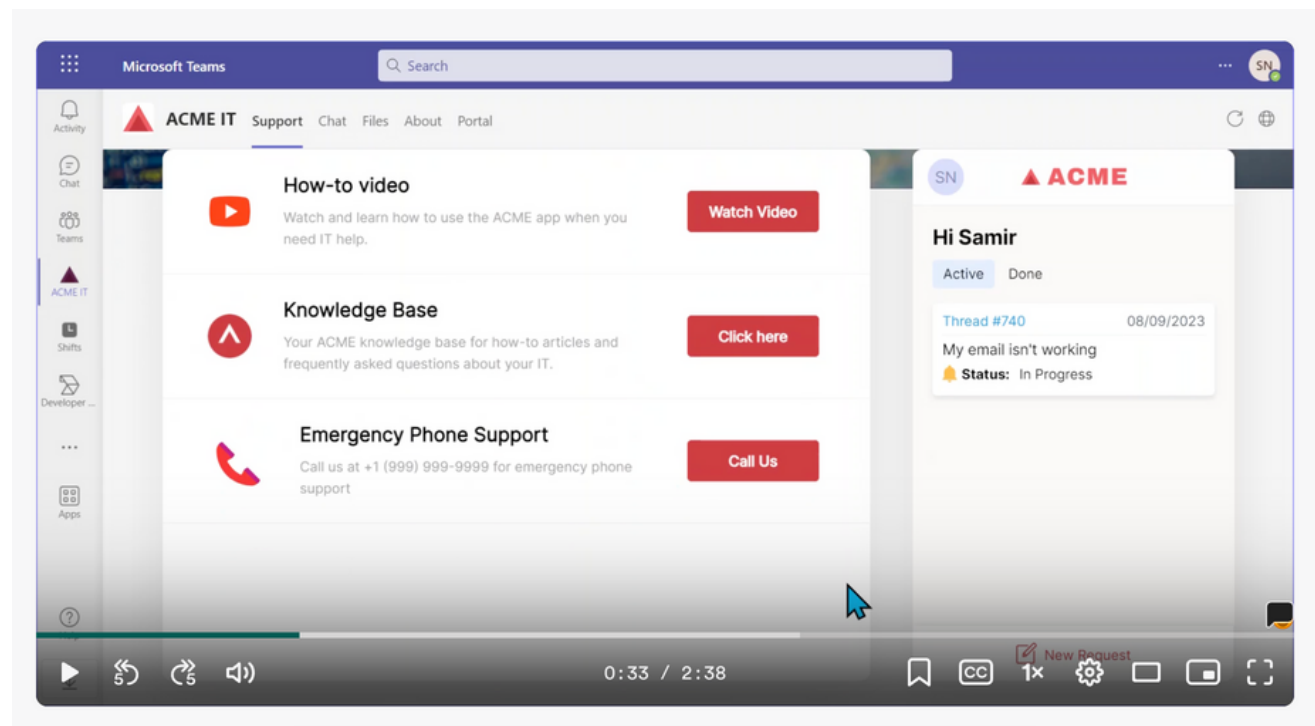
1. Individualized email templates in our Thread Help document section
2. Short clip on how to request IT support from Teams
3. A phone call to the POC at the company so they can relay the news.
4. Most importantly, be EXCITED to your customers!

https://docs.getthread.com/category/raw92tck9g-share-docs

thread

Technical Support

- Help Docs: **https://docs.getthread.com**

- Chat with us via the widget in your admin panel: **https://admin.getthread.com**

- Chat with us: **https://help.getthread.com**

- Email us: **help@getthread.com**

Let's make service magic together! ✨

thread

Let's make service magic! ✨