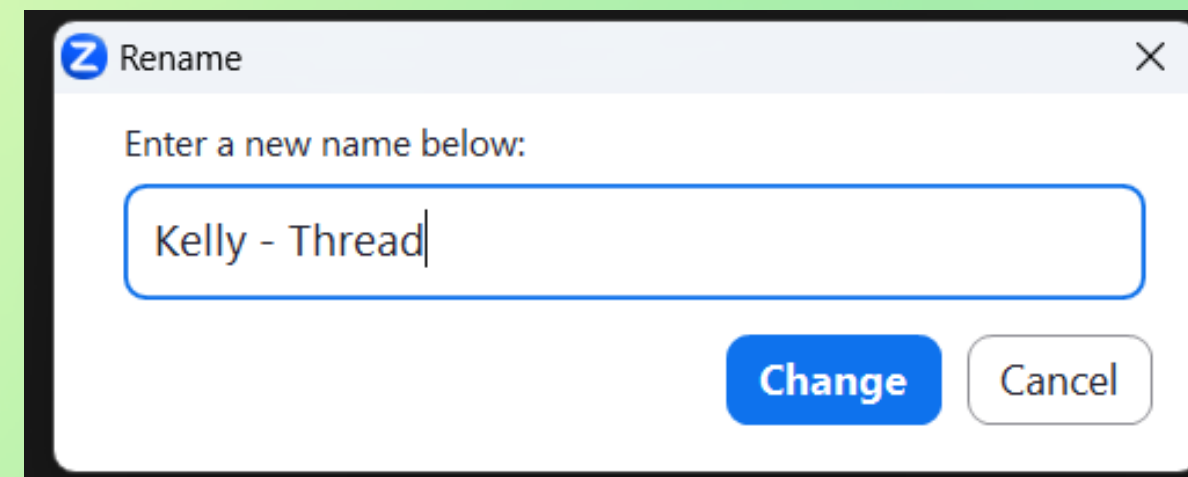
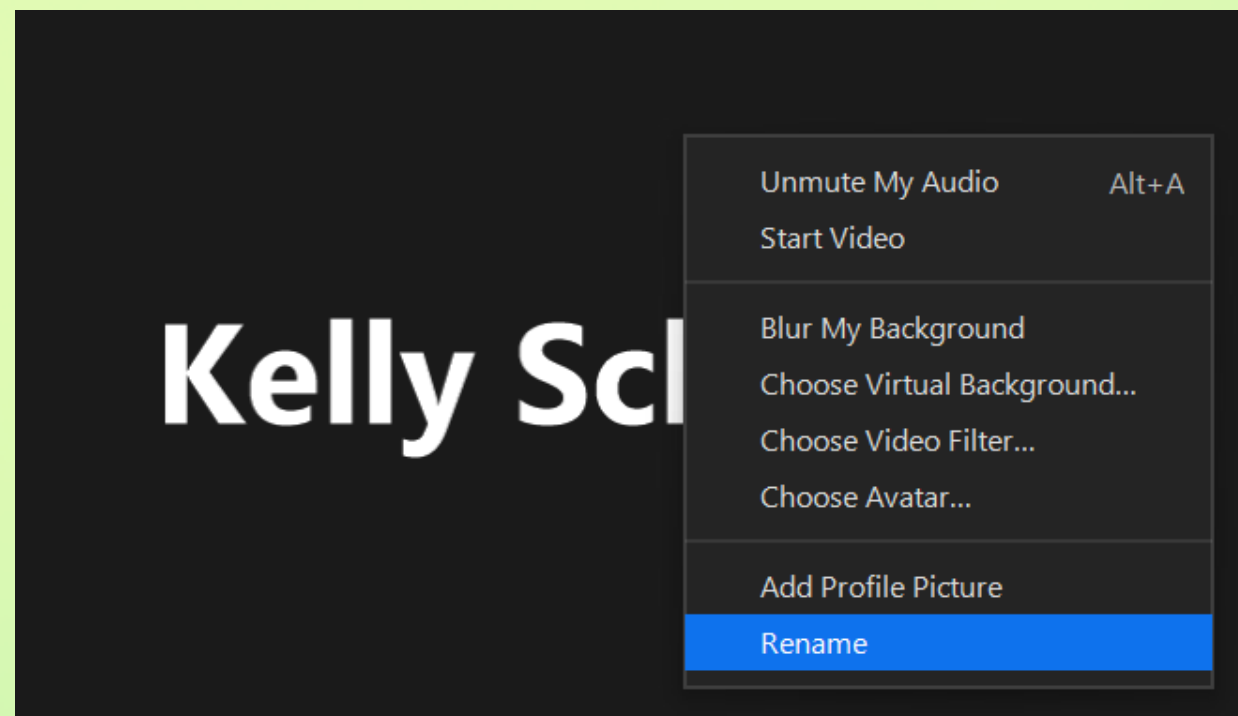


thread

Please right click to rename your Zoom avatar: "Name + Company"



Amanda Swanson & Kelly Schwarz

Customer Success Managers



Let's make service magic together! ✨

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

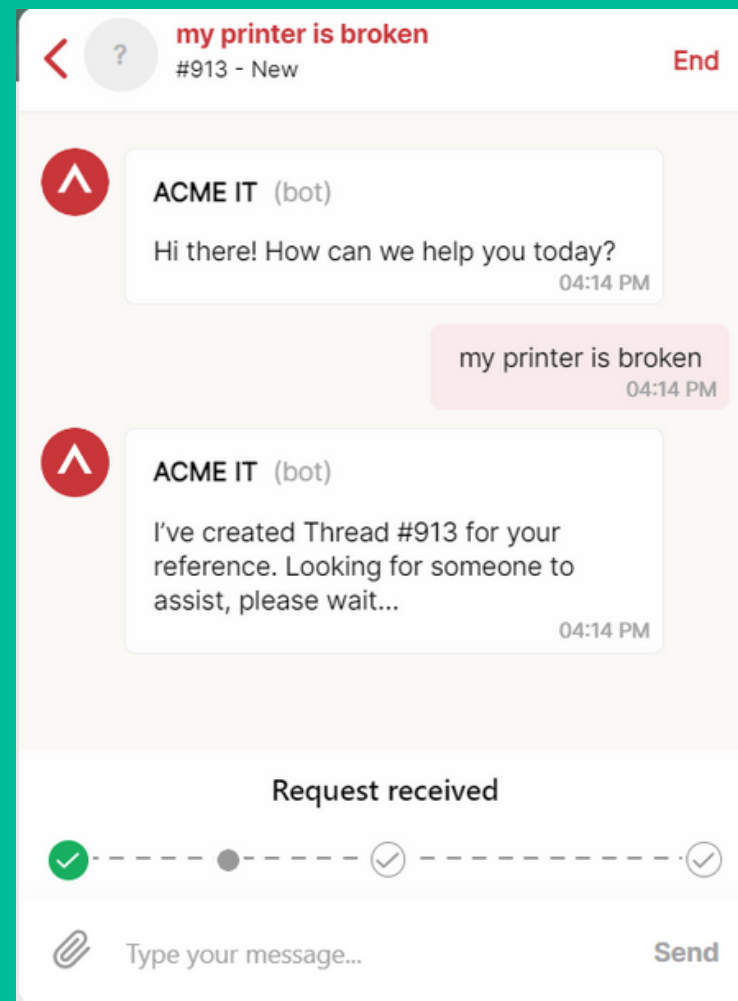
Let's make service magic together! ✨

Thread Overview

Customer-facing:

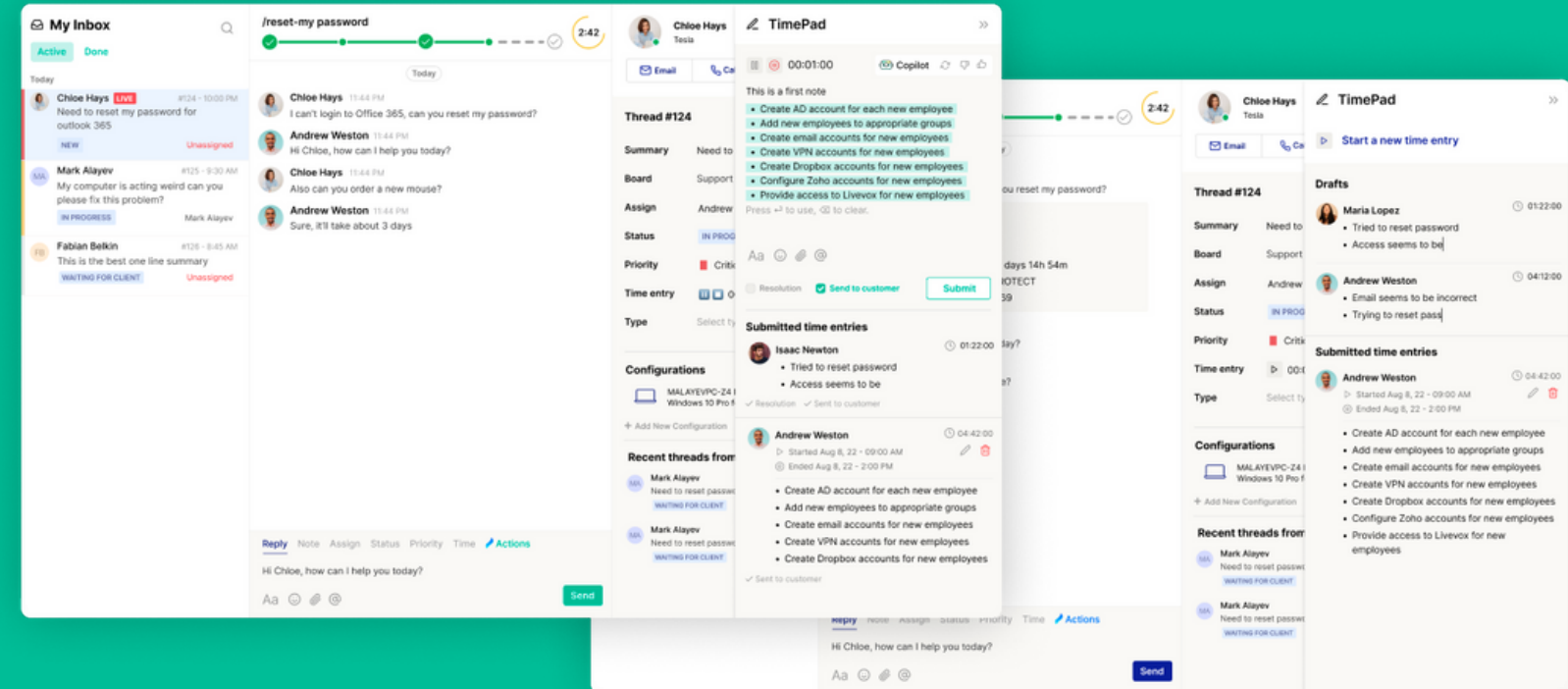
Messenger Service Chat Apps

- Teams
- Slack
- CloudRadial
- Desktop
- Web

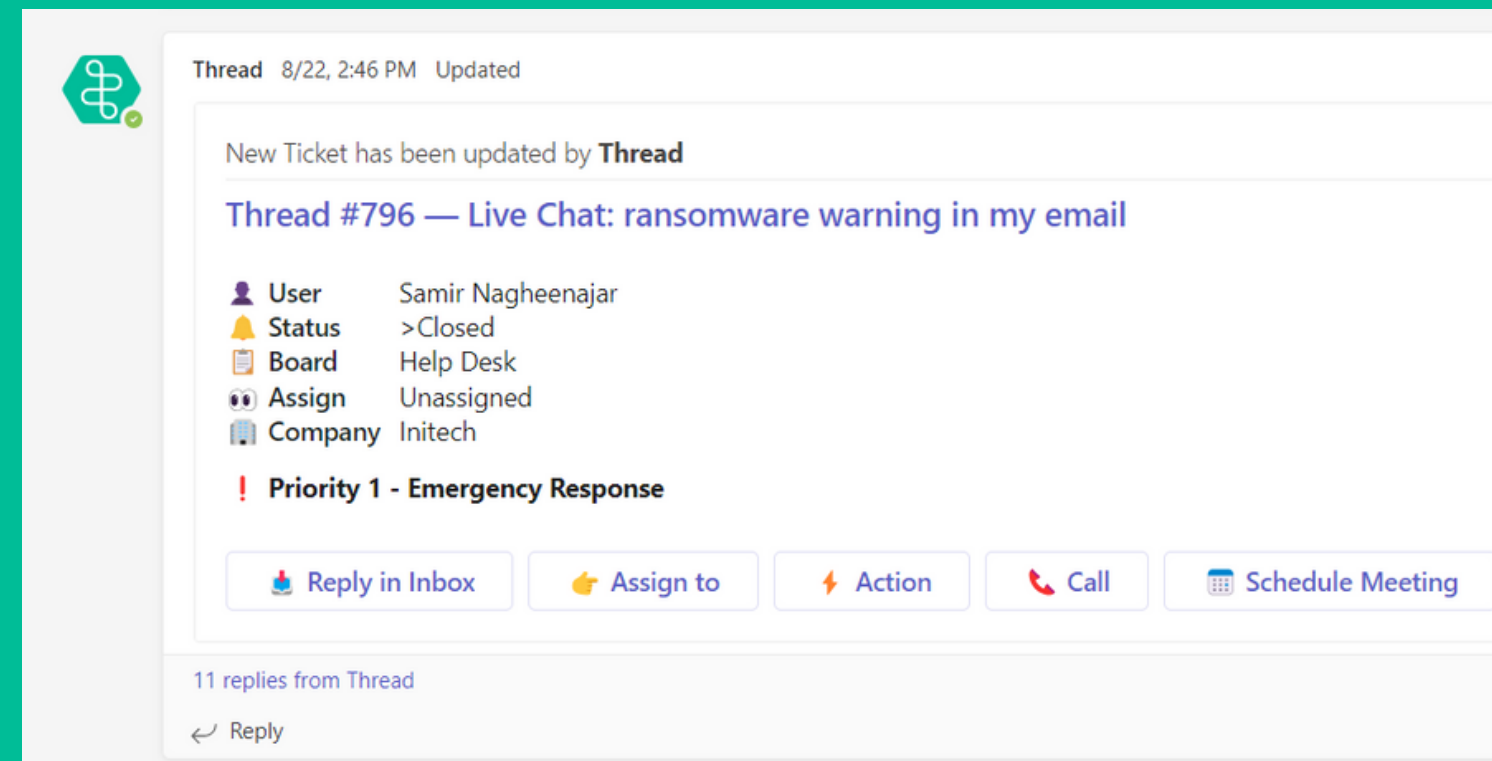


Internal-facing:

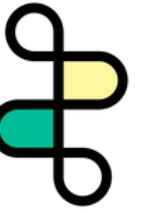
1) Inbox



2) Teams/Slack Integration (“Companion App”)

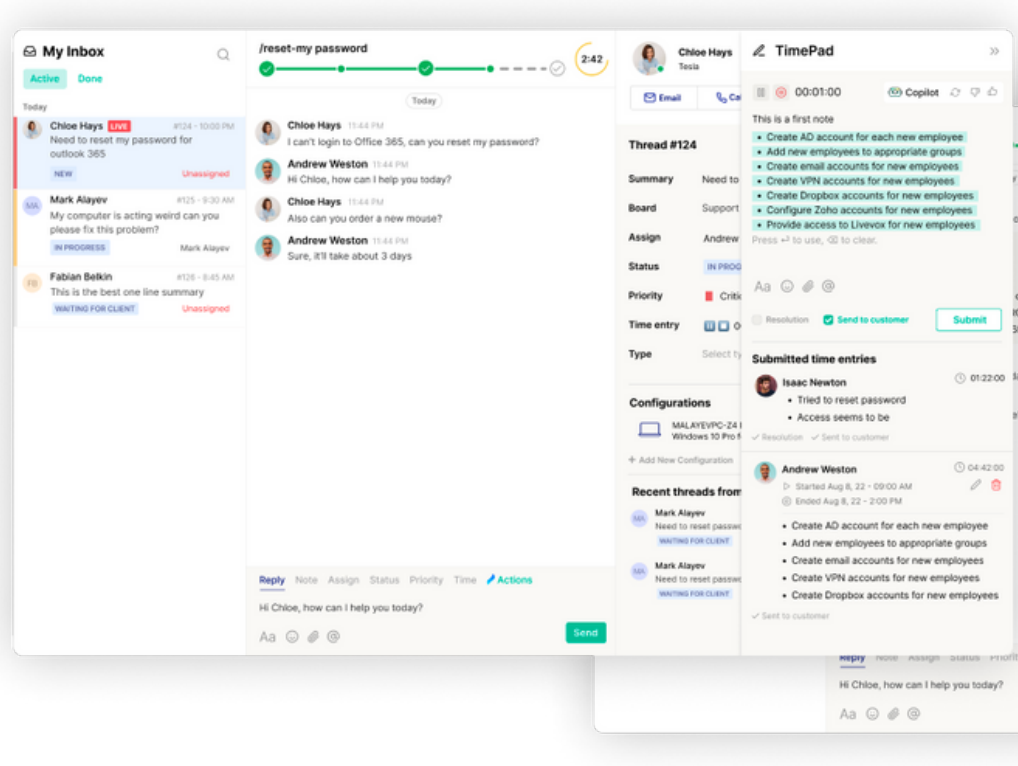


Thread Inbox

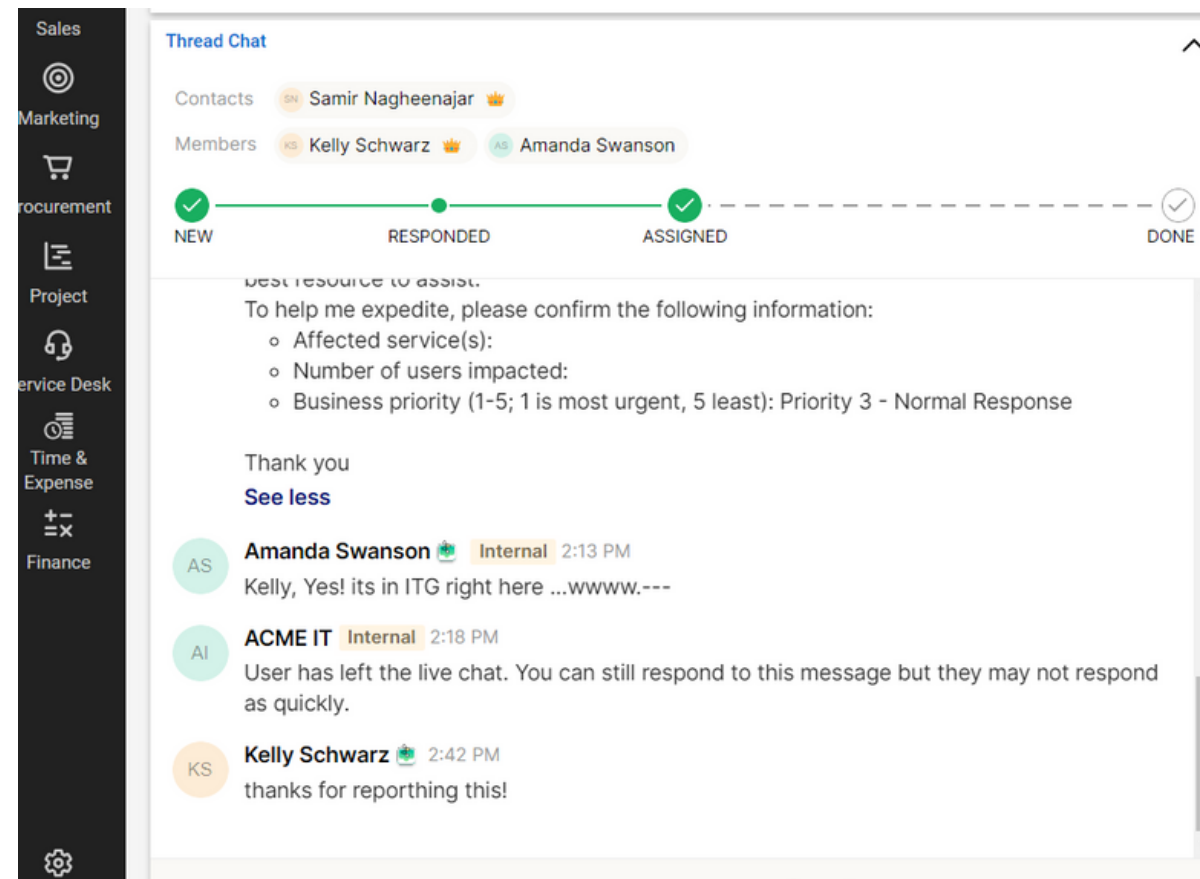


- Bi-directional sync with your PSA
- You can respond to Thread chats and other tickets from both Inbox and PSA, but we think you'll prefer Inbox because it is a **real-time** platform
- Inbox also offers additional streamlining and automation your service team will love
- Available via **web, desktop, and now inside your PSA!**

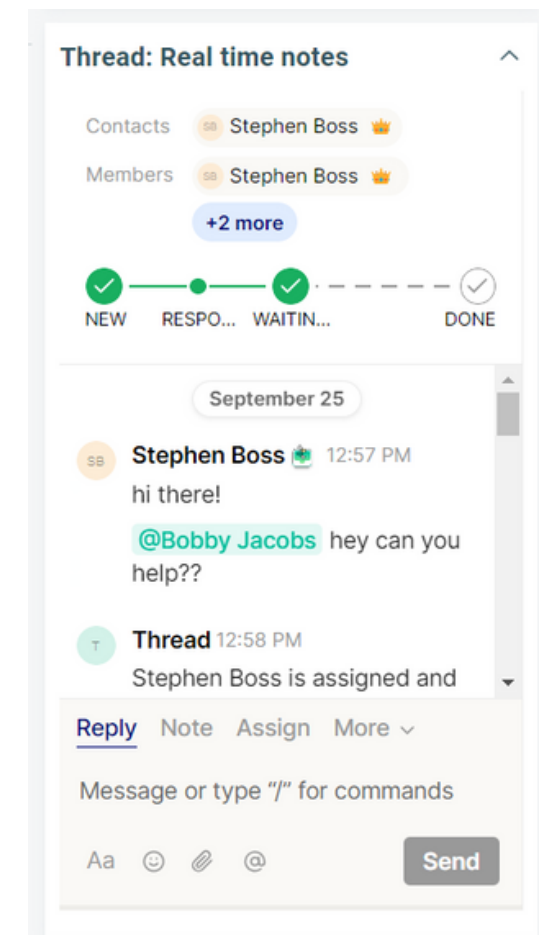
Inbox (Web/Desktop)



ConnectWise Pods



Autotask Insights



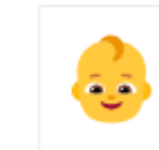
Inbox Channels - Overview

- 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*

A screenshot of the 'CHANNELS' list in the application. The list is titled 'CHANNELS' with a plus sign to its right. It contains several channels, each with an icon, a name, a count in a blue bubble, and a mute icon. The channels are: '*all-threads' (37), '*chat-threads' (37), '+P1 & P2' (7), '+VIP' (11), '1. Triage' (23), '2. To Do' (2), '3. Working' (9), '4. Escalated' (1), '5. waiting-us', '6. waiting-customer', and '7. scheduled' (3). The '1. Triage' channel is highlighted with a grey background.

Edit channel

Icon



Name

1. Triage

Add team members

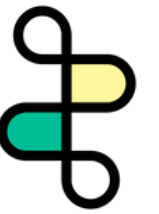
A screenshot of the 'Add team members' section. It shows a list of team members with their initials in a circle, their name, and their email address. Each member has an 'x' icon to their right. The members are: Stephen Boss (stephen@getthread.com), Bobby Jacobs (bobby@getthread.com), Matt Linn (matt@getthread.com), MARK THREAD (mark@getthread.com), Kristof Orts (kristof@getthread.com), John Snyder (john@getthread.com), Griffin Steinman (gsteinman@getthread.com), Amanda Swanson (amanda@getthread.com), Ricky Balmaceda (ricky@getthread.com), and Kelly Schwarz (kelly@getthread.com).

Linked flows

- Michael Bolton Tips
- +triage flow

Delete channel

Confirm



Inbox Flows

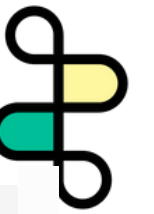
- Check out our flow Templates:
<https://admin.getthread.com/dashboard/templates>)
- View/edit existing and create new Flows:
<https://admin.getthread.com/dashboard/flows>

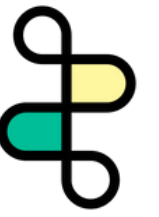
And/Or Logic, Rules, and Grouping

The screenshot shows a configuration interface for filter rules. It features three stacked rule boxes. Each box starts with a logic operator: the first is 'Where', the second is 'AND', and the third is 'AND'. Below the first 'AND' is an 'OR' option. Each rule box contains a text input field with 'Status Name', a dropdown menu with 'Like' selected, and an empty text input field. To the right of each rule box is a green square button with a white 'x' icon. At the bottom left of the interface are two green buttons: '+Rule' and '+Group'.

Filter Options

The screenshot shows a dropdown menu for filter options. The left column lists fields: Status Name, Date, Contact Type, Company Type, Time of Day, Day of week, Impact, Severity, Agreement, Opportunity, and Source. The right column lists fields: Service Location, Owner, Team, Contact, Zip, State, City, Address Line 2, Address Line 1, Companies, and Status. A secondary list on the far right includes Priority, Sub type, Type, Country, Summary, Budget Hours, Board, and Site. A vertical scrollbar is visible on the right side of the menu.





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)

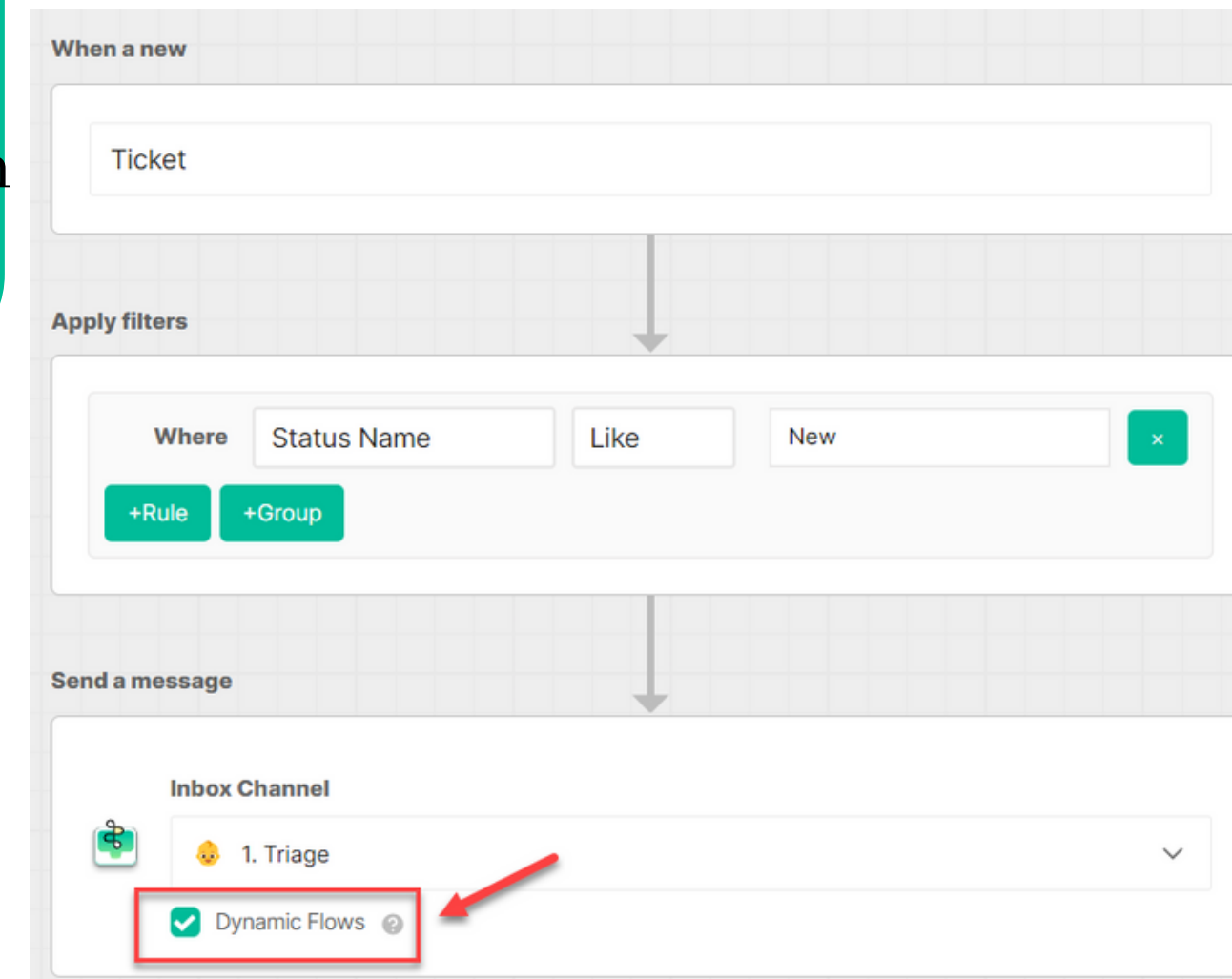
Recommended for:

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

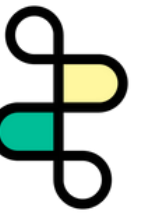
Dynamic flow setting -- threads are routed into the channel by flow filter criteria and then routed out of the channel once they no longer meet the flow filter criteria

Recommended for:

- Status-based channels such as “Triage,” “In Progress,” etc.
- Priority-based channels



Inbox Channels - Link to Teams/Slack Companion App

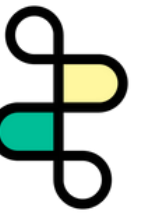


- Via flows, you can link Inbox channels to your internal-facing Teams/Slack Companion App
- Recommended for:
 - P1 Issues
 - VIP
 - At-risk accounts

The screenshot shows a configuration interface for linking an inbox channel to a Teams/Slack channel. It is divided into three main sections:

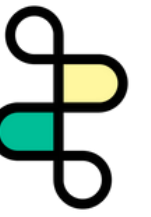
- Apply filters:** A rule is defined where the 'Where' field is 'Priority', the operator is '=', and the value is 'Priority 1 - Emergency Response'. There are '+Rule' and '+Group' buttons below the rule.
- Send a message:** This section contains two main configuration areas:
 - Inbox Channel:** A dropdown menu is set to '+P1 & P2'. Below it, the 'Dynamic Flows' checkbox is checked.
 - Team:** A dropdown menu is set to 'ACME Service Desk'.
 - Channel:** A dropdown menu is set to '# Urgent Issues'.
- Additional options:** At the bottom, there is an unchecked checkbox labeled '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

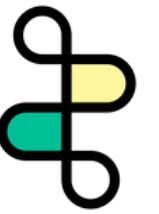


- 1) Set your priority rules (starter prompts: <https://docs.getthread.com/article/hnhksbutjg-starter-prompts-for-service-copilot-auto-prioritization>)
- 2) Configure a flow to enable auto-prioritization

The screenshot displays the configuration interface for an AI Service CoPilot flow. It is divided into three main sections:

- Where:** A rule configuration section with a dropdown menu set to "Board", an equals sign, another dropdown menu set to "Help Desk", and a green "x" button. Below this are two green buttons labeled "+Rule" and "+Group".
- Send a message:** A section with a grid background. It contains an "Inbox Channel" dropdown menu with a green icon and a "Dynamic Flows" checkbox.
- Action:** A section with a grid background. It contains a "Team" dropdown menu with a red trash icon, a "Channel" dropdown menu with a blue icon, and a "Create a new channel for each ticket" checkbox. Below these are tabs for "Reply", "Note", "Priority", "Assign", and "Actions" (which is selected and underlined). A breadcrumb trail shows "< Copilot / Auto Prioritize / Copilot" and a final row shows "Auto Prioritize" with a checkmark.

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:

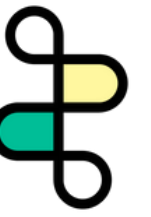
- Channels for each tier
- Additional status-based channels
 - Ex: “Escalated”

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.

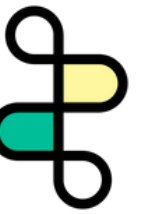
- Over time, chats tend to displace expensive sources of support, like phone.
- With this change, customers will be happier and your team will see a huge efficiency increase.

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).

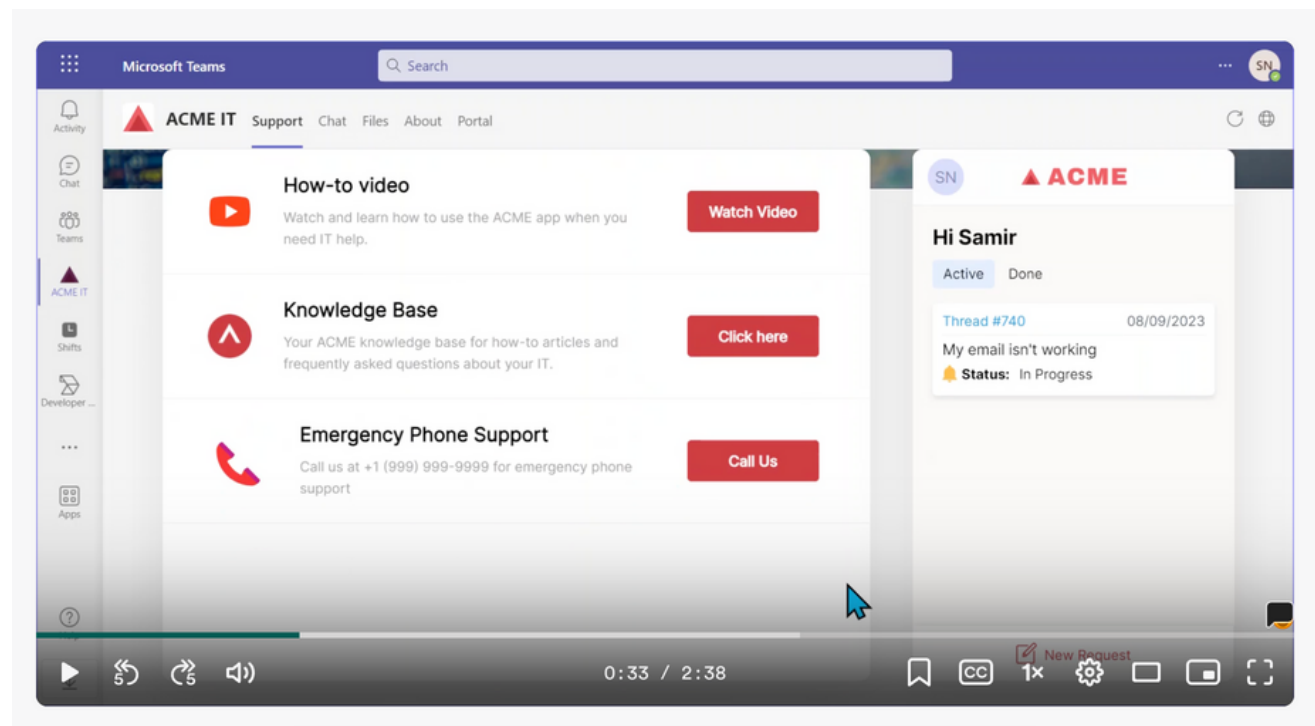
- Not enough chats week 1 to justify spinning up your entire service desk on Thread right away.
- They can handle their day job while being really responsive to your first customers chatting in, **your customers will ❤️ Thread.**

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! ✨