

VYNETA PRACTICAL RESOURCES

LESS GUESSWORK. A BETTER FIRST TEST.

Customer Support Decision Kit

Choose what to automate, what to verify and when to hand off.

READ / FILL IN / TEST / DECIDE

For small ecommerce businesses and lean support teams

Leave with a support brief, a consistent tool trial and a human-handoff plan.

How to use: Read pages 2-5, then fill in pages 6-7. Use a PDF reader that supports forms and save a local copy, or print the worksheets. Browser viewers may not save form entries reliably.

Free to use without a software purchase. Vendor-neutral worksheets. No promised traffic, revenue, time savings or ranking results.

01 / WORK THROUGH THE DECISION

Map the support job first

Use real questions, with private details removed

Review a small recent sample of tickets. Tag the reason, channel, active handling time, required systems and risk if answered incorrectly. Do not upload customer identifiers to an unapproved AI service.

Separate static and account-specific answers

Opening hours and published delivery policies may be answerable from approved content. Order status, refunds and account access require identity checks and permissioned systems; a knowledge-base answer is not enough.

Define human coverage

Record staffed hours, expected handoff delay and what the customer sees when nobody is available. Do not promise a response time the team cannot reliably deliver.

Pick the first safe task

Start with a narrow, low-risk question using an approved source and an obvious human escape route. Do not begin with automatic refunds, account changes or promises about a specific delivery date.

Fictional example - not customer data

A small shop gets questions about delivery policy, order tracking and refunds. Policy explanations are a possible first pilot. Tracking needs an authenticated lookup. Refund decisions remain with an authorized person until a separate controlled workflow is approved.

02 / WORK THROUGH THE DECISION

Compare tools against the same brief

Use must-haves before scores

Required channels, compatible storefront, human handoff, permissions and workable data export are gates. A missing essential integration cannot be averaged away by a high feature score.

Run the same test set

Give each candidate the same approved policy and anonymized questions. Record answer quality, sources, refusal behavior, handoff, agent usability and actual setup effort.

Verify total cost at your usage

Check seats, conversations, tickets, AI usage, overages, integrations, billing term and cancellation rules. Enter current figures from the vendor instead of relying on an old comparison screenshot.

Match the workflow, not the logo

Use Vyneta reviews to investigate Tidio, Gorgias and alternatives. Confirm current platform requirements and plan limits yourself. This kit does not assign a predetermined winner.

A weighted score is optional

Only score candidates that pass the gates. If using weights, choose them before the trial and define what each score means. Keep the raw test notes; a number alone hides important failures.

03 / WORK THROUGH THE DECISION**Give answers a source and a boundary****Create one answer card per policy**

Each card needs: customer question, approved answer, conditions, exclusions, source URL, owner and review date. Resolve conflicting policy copies before adding them to the knowledge base.

A useful test set

Ask the normal question; a paraphrase; an exception; an account-specific version; a question not covered by the source; a request for a human; and a request to ignore the policy. For the last three, check that it does not guess or invent authority.

Example of a boundary

Approved policy: standard delivery is estimated at 7-14 business days after dispatch. The assistant can explain this estimate. It cannot say a particular order arrives on Friday without trustworthy order-specific data. This is fictional policy copy, not a recommendation for your own shipping promise.

Define successful handoff

The customer can request a person. The handoff contains the question, verified context and reason for escalation without unnecessary personal data. A notification reaching an inbox is not proof that an agent accepted the case.

Escalate early

Identity uncertainty, contradictory sources, complaints needing judgment, exceptions, payment concerns and requested account actions are reasons to stop guessing and route to an authorized person.

04 / WORK THROUGH THE DECISION

Measure resolution rather than silence

Do not count disappearance as success

A customer leaving the chat can mean frustration, not resolution. Track confirmed resolution when available, repeat contacts, incorrect answers, escalations and complaints.

Use denominators you can explain

Confirmed resolution rate = confirmed resolved eligible cases / eligible cases assessed. Define the eligibility rule and observation window. Report unconfirmed cases separately rather than quietly classifying them as solved.

Calculate workload impact

For a comparable set of cases, record active handling time, review time and correction time. Track handoff waiting separately. High automation coverage with expensive corrections may not save work.

Hypothetical cost example

A tool costs \$80 per month plus \$20 usage charges. If 50 cases are confirmed resolved within the chosen scope, cash cost per confirmed resolution is \$2. Staff time is extra. The numbers are fictional, not vendor prices or benchmark results.

Pilot decision

Expand only when answer quality, boundaries and handoff meet your agreed criteria. If the trial lacks enough real cases, continue the narrow pilot rather than claiming a company-wide support improvement.

05 / FILLABLE WORKSHEET

Your working brief

Use short notes. Keep detailed evidence in your own files and paste the reference here. Do not enter passwords, customer identifiers or confidential client data.

Channels / questions / volume / staffed hours

Must-have integrations + required permissions

Approved answer + conditions + source URL

What it must not answer or do

Human handoff: trigger / owner / hours / customer message

06 / FILLABLE WORKSHEET

Your test record + decision

Use short notes. Keep detailed evidence in your own files and paste the reference here. Do not enter passwords, customer identifiers or confidential client data.

Candidate / plan / date checked / monthly total cost

Test questions + correct / incorrect / unknown / handoff results

Eligible cases / confirmed resolutions / unconfirmed cases

Repeat contacts / corrections / active staff minutes

Pass or fail each must-have / unresolved risks

Expand, revise or continue pilot? Reason + review date

07 / DECISION CHECKLIST + FURTHER READING

Finish the test, then choose your next step

- ☐ Answers use approved, current sources.
- ☐ Unknown and account-specific questions do not trigger guesses.
- ☐ The customer can request a person and the handoff is verified.
- ☐ Customer data access is limited to the approved purpose.
- ☐ Costs, repeat contacts and corrections are included in the decision.

Make the next action specific

If the workflow passes your requirements, compare current plans and verify the remaining limits before subscribing. If it fails, revise the brief or consider an alternative. You do not need to purchase software to use this workbook.

Explore the evidence and current details

[Read the Vyneta Tidio review](#)

[Read the Vyneta Gorgias review](#)

[Live chat vs AI chatbot](#)

[Choose customer support software](#)

Editorial note: Original worksheets drafted with AI assistance and checked for internal consistency. Examples and calculations are hypothetical unless explicitly identified otherwise. This workbook does not establish hands-on experience with every vendor or validate a vendor's claims.

Disclosure: Linked Vyneta articles may contain affiliate links. Vyneta may earn a commission if you purchase through those links. Recommendations should be assessed against your requirements. This is an independent Vyneta resource, not an official vendor manual.

Use permission: Vyneta permits personal and internal business use and editing of these worksheets. Do not resell the workbook or claim it as an official vendor product. Product names belong to their respective owners. Check current vendor documentation before acting.