AI for Customer Communication

Use AI to improve clarity in routine drafts, then confirm the details yourself before sending.

Put it into practice

1. Describe the message purpose using a fictional customer and no private access or contact information.

2. Provide the confirmed scope, timing, and next step. Ask for a brief, polite draft.

3. Review for invented commitments, incorrect dates, unnecessary information, and pressure.

Starter example

Prompt: Draft a polite [ENQUIRY REPLY / REMINDER / FOLLOW-UP] using these verified facts: [FACTS]. Keep it under 90 words. Do not promise availability or change prices. Use placeholders for customer details. Flag missing facts instead of guessing.

Your next action

Message purpose / verified facts / next step to confirm

Replace placeholders privately after review. Do not let an unchecked draft make decisions about refunds, sensitive disputes, or care instructions.

Continue with the practical decision guide and worksheet on the next pages.

Keep drafting separate from customer commitments

Work through the decision

Use fictional or de-identified context to improve wording, then insert real details privately after review. Supply the confirmed purpose, scope, timing, and next step. Make it clear whether the message is an enquiry reply, a quote explanation, a reminder, or a follow-up.

Ask for a short draft that does not change the terms. Review every date, amount, task, and promise. A tool may turn a tentative time into a booking or soften an exclusion until it disappears. Compare the final message with the actual agreement before sending.

A situation to learn from

Example: you want to explain that an appointment is not confirmed until scope and availability are checked. If the draft says We look forward to seeing you tomorrow, it has created a commitment. Replace it with a clear explanation of the assessment and confirmation step.

How to respond

For sensitive complaints, refunds, or care needs, establish the facts and use your appropriate process. AI can help organise a draft but should not decide the outcome or invent advice. Remove identifiers, access codes, health details, and private correspondence from prompts unless you have a suitable authorised process.

Message drafting template

Use this page with your own service and circumstances. Record assumptions separately from confirmed facts, and update the plan using actual work.

Purpose: [message type]. Verified facts: [public or fictional context]. Agreed terms: [scope].

Prompt: Write a polite draft under 90 words. Do not add availability, change prices, or invent an outcome. Flag missing facts.

Review: commitments / dates / price / tone / privacy / single next step.

Final step: insert necessary real details privately, check recipients, then send through your normal channel.

Review before taking the next step

Revision prompt: The draft implies [unsupported commitment]. Replace it with [verified fact] and keep the customer's next step clear.

- [ ] Draft and confirmed agreement match.
- [ ] No private customer data in prompt.
- [ ] Outcome decided by an appropriate person.
- [ ] Recipients and final details checked.

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