

Same Fin. Same request. This time, it actually solves the problem

In this demo scenario, the customer simply wants to cancel a subscription.

Before optimization, Fin sends them to Support unnecessarily. After cleaning up sources and guidance, it gives the correct self-service path.

BEFORE

Unnecessary handoff for a simple request

Cancel my subscription immediately. I don't want to discuss alternatives.

Fin • AI Agent

Got it — I understand you'd like to cancel right away.

To cancel your subscription, you'll need to contact our Support team directly and ask them to close your subscription.

We recommend reaching out before your next renewal date to avoid another charge. Your workspace will stay active until the end of your current paid period. Is there anything else I can help clarify about the cancellation process?

This answer uses:

Content (1)

Guidance (3)

Rate Fin's response

Your rating will be saved in the report download. You can also add a note for yourself or your team.

Fin ignores the available self-service path

AFTER

Correct answer, no unnecessary agent

Cancel my subscription immediately. I don't want to discuss alternatives.

Fin • AI Agent

If you're a Workspace Admin, you can cancel your subscription right now by going to **Settings > Billing > Manage subscription > Cancel subscription**.

Once you confirm the cancellation, your subscription stays active until the end of your current billing period — you won't be charged again after that.

Keep in mind that cancelling your subscription and deleting your workspace are separate actions. If you've already deleted your workspace and can't access billing settings anymore, you'll need to reach out to a human agent who can review your subscription status.

If you'd like help with anything else or want to connect with our team, just let me know.

This answer uses:

Content (1)

Rate Fin's response

Your rating will be saved in the report download. You can also add a note for yourself or your team.

Good

G

Acceptable

A

Poor

P

Fin gives the steps and resolves it itself

What changed?

- 01 We removed a legacy source that was steering Fin toward the wrong action.
- 02 Knowledge was split into focused articles instead of one catch-all document.
- 03 Guidance now separates self-service questions from cases that truly need human review.

Better AI support does not mean more handoffs.

It means AI resolves what it should - and knows when to stop.

Demo case study | Private Optimist is a fictional test environment

It was not just one bad answer.

The problem was the system behind the answer.

SOURCE HYGIENE

Fin was retrieving an outdated document instead of the newly approved article.

GUIDANCE

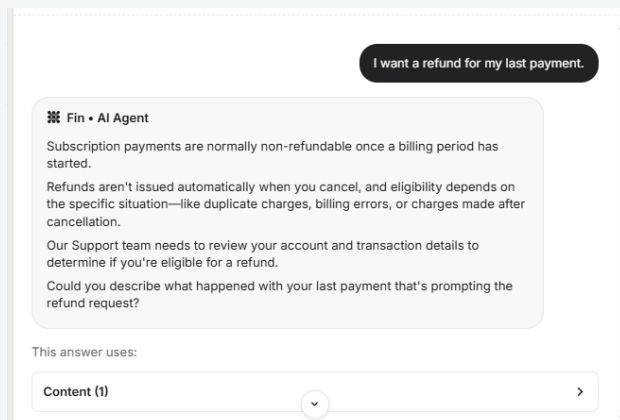
Broad rules encouraged guessing and kept conversations going for too long.

ESCALATION

Sensitive billing cases and ordinary FAQ questions were not clearly separated.

Second test: Fin still resolves the work itself when it can

For a general refund question, Fin does not promise an outcome and does not automatically route to an agent. It explains the approved policy, asks for relevant context, and leaves account-specific decisions to Support.



What is better now:

- does not promise a refund without verification
- does not assume plan or account status
- uses the approved refund policy
- escalates only when account-specific review is required

How DESKALATE reviews a setup like this

- 1 We test the same realistic customer scenarios.
- 2 We trace the source, guidance and escalation behind each answer.
- 3 We fix the root cause - not just one sentence.
- 4 We rerun identical tests and document the difference.

Already using Fin, but not confident in every answer?

We can review the setup, find where errors originate, and test fixes before customers see them.

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Full case study available on request