WHITE PAPER

Transitioning to **AI-enabled** customer journeys

How Big Data, Machine Learning and AI are combining to create the smart CX data platforms essential for customer journey success

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1.
Smart Analytics is the key to frictionless CX

Every decade it seems that a new computing interaction paradigm emerges. In the 1990s it was the Web, Mobiles set the agenda in the 2000s, and Touch dominated throughout the 2010s along with the introduction of first-generation Assistants such as Alexa and Siri. However, with 2020 looming, we're now experiencing a race to create a single interface for the user – and the Virtual Assistant era is upon us.

While AI continues to sit at the peak of the hype cycle, there's no doubt that its broader influence is starting to have a significant impact on how organisations develop their CX strategies and deliver service to their customers.

Certainly the range of potential AI-enabled opportunities is broad, with potential examples including:

- The automation of simple tasks for agents
- Using AI to identify poor service and raise issues for review/ resolution
- Applying AI to better predict staffing requirements
- Deploying NLP and speech analytics to help identify changes to business processes to drive improvements
- Developing smart virtual assistants to help achieve the right balance between digital and human-assisted services

So, it's perhaps hardly surprising that analyst firm Gartner predicts that by 2022, some 72% of customer interactions will involve some form of Artificial Intelligence, with around 15% of those processes being handled entirely by AI. At the same time, Nemertes Research suggests that 47% of organisations already use AI in some form – whether it's virtual assistant technology, Natural Language Processing, Knowledge Management or machine learning – to drive their customer interactions.

Indeed AI technologies such as machine learning, natural language understanding and cognitive computing are seen as being instrumental in powering the kind of digital transformation strategies that will enable scalable, consistent and improved outcomes for businesses and customers alike.

However, it would be a mistake to assume that AI alone can provide all the answers. The automation of simple tasks for agents – leaving them with just the complex tasks to focus on – sounds great from a productivity point of view, but what happens if this approach ends up just burning agents out or reducing CSAT scores as their shifts progress?

And while the key challenge facing today's Customer Experience teams remains how to engage more effectively in a world where their customers are communicating more than ever across multiple websites, social/messaging networks and other digital channels, organisations will also need to accommodate increasing customer privacy concerns as they continue to develop their AI and personalisation strategies.

However, that organisations could jeopardise their overall CX performance if they are determined to debut next generation technologies without thinking seriously about the multiple, and invariably interlinked, data sources that are needed to drive their AI-enabled projects.

With over 50% of organisations now forecasting a reduction in their overall contact centre voice traffic, the CX industry has now passed 'peak traditional voice', and how brands respond to this profound shift in customer engagement is critical.

Although steering more and more people towards digital and self-service channels may succeed in deflecting lower value interactions away from the contact centre, true digital transformation won't occur until CX teams succeed in delivering the right balance of self-service and assisted service. Engagement will need to begin much earlier in the process through pre-contact journey shepherding, and also extend much further on via post-contact journey and satisfaction validation activities.

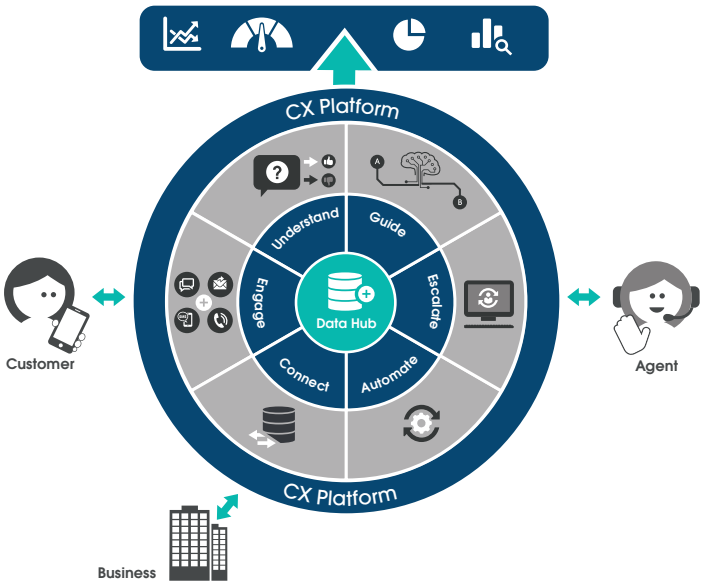
Achieving this will increasingly involve the ability to offer the right mix of digital self-service and conversational AI capabilities, as well as the provision of a new generation of smarter analytics and insight that can effectively track and inform the user experience across end-to-end customer journeys

At Sabio we're convinced that within the next few years a majority of customer interactions will be fronted by conversational AI-enabled virtual assistant technology, and that these solutions will quickly evolve to enable smarter interactions and deliver better CX outcomes for customers. Clearly this technology will be instrumental in helping to transform the customer's CX journey. However, the ultimate success of this kind of solution will pivot around how these interactions are seamlessly blended with more complex human-assisted service capabilities to enable the delivery of more contextual, personalised service.

In managing this transition, it's essential that organisations work to maximise customer interactions across all their mobile, web, voice and messaging channels – and key technologies such as conversational AI-enabled virtual assistant technology and NLP platforms will have an important role to play. There is a risk, however, that organisations could jeopardise their overall CX performance if they are determined to debut next generation technologies without thinking seriously about aligning solutions with their operational processes, as well as leveraging the multiple, and invariably interlinked, data sources that are needed to drive their AI-enabled projects.

2.
Breaking down your Customer Engagement reporting silos

Given the extended nature of today's customer journeys, it's hardly surprising that many brands now collect 30-50 different datasets from discreet touch points. Each of these datasets is valid in itself, but it's rare for the specific data collected to extend beyond reporting on 'what happened?'. And it's rarer still for these different data points to be joined-up across customer journeys.



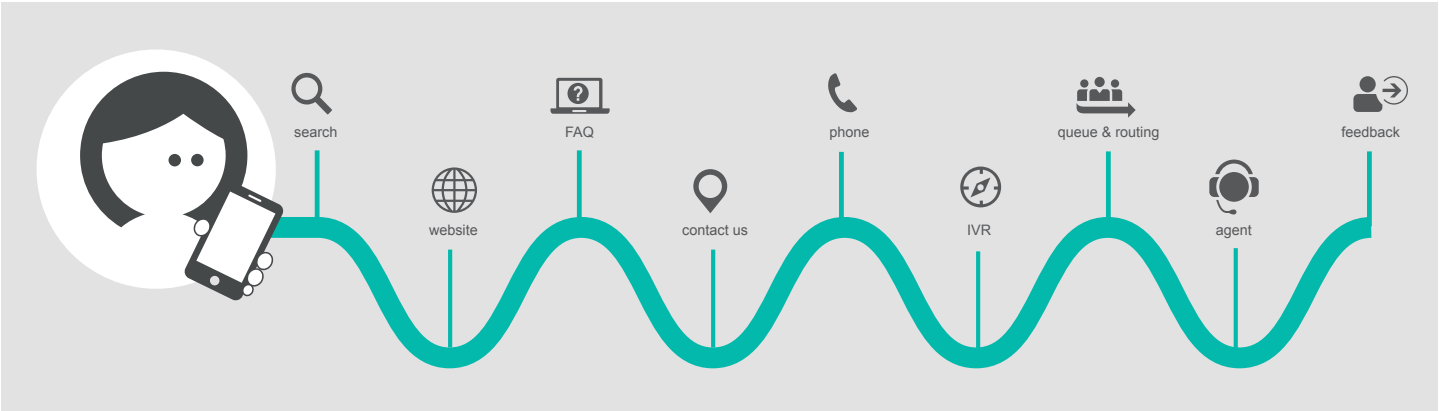
The result is that very few organisations get a chance to visualise and analyse all the data they gather holistically. While many customer contact operations already have strong reporting and analytics from their contact centre operations, it's fair to say that data from their digital and self-service channels is much less mature. As a result, very few are able to link this data to the actual processes and outcomes identified from web chat, virtual assistants, speech analytics or customer feedback.

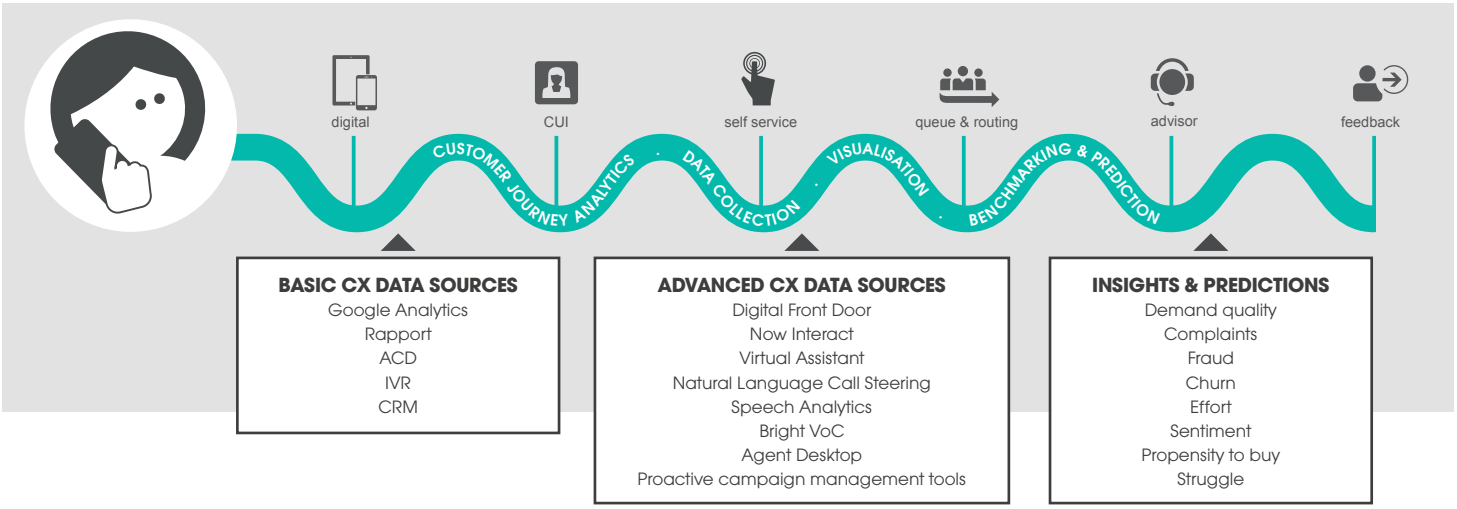
For example, digital teams will focus on their website, while contact centre operations instead concentrate on traditional WFM and quality metrics. Even for those few organisations that have properly-resourced CX teams, it's still difficult to create an end-to-end view, and that can prove a concern when activity in one strand of the customer journey could be having a direct impact on the productivity of another.

An unresolved issue on the website might be leading to increased customer traffic into the contact centre. The contact centre team would typically accommodate the spike in demand, but wouldn't necessarily be aware of the root cause being something specific on the website or indeed be in a position to trigger the action the web team needs to identify the issue and fix it.

What's clear is that current customer journey initiatives still have some way to go to move beyond simply collecting data and optimising single touch points. There's obviously real value to be gained by linking together the different data silos that already exist across the end-to-end customer journey – indeed it's an essential step for organisations if they're serious about analysing their CX performance through the lens of the customer rather than just their own individual customer journey functions.

Linking these silos together unlocks new opportunities for CX teams to move beyond basic reporting and start introducing a more useful predictive analytics – starting to ask 'what will happen?' rather than just 'what happened?'. This smart analytics capability will also help organisations to fine tune CX operations to deliver more valuable outcomes. Instead of simply optimising costs or increasing contact productivity, they can start to get more from their data by enabling cross-platform and cross-channel analytics. Only then can they start to map end-to-end performance.





3. Enabling a joined-up approach to CX datasets

Given the increasingly complex nature of today's extended customer journeys, it's perhaps surprising that so few organisations have committed to a joined-up approach to their multiple CX datasets.

A key reason is that customer journey metrics are still predominantly focused on operational performance. A Workforce Management team, for example, will quite rightly be concerned when their contact volumes suddenly escalate. In response they will look at contact centre traffic levels, factor in staff availability and manage the WFM process to handle shifting demands. What they won't necessarily do will be to look into whatever caused the demand spike in the first place.

Having access to an integrated CX dataset will encourage operational teams to tackle emerging customer experience challenges as far upstream as possible – certainly before demand spikes hit the contact centre, and ideally before potential customer issues hit digital barriers.

Adopting a smarter data strategy becomes important as brands work to balance online and offline engagement channels. Without an integrated data approach, agents have very little insight into why a customer has got in touch or of the different interactions they had before. With a more joined up data strategy, the experience can be very different, with an agent knowing who you are, your website path and the activity outcomes that may have triggered the contact centre call.

4. Adopting a phased approach to CX data insights & analytics

While brands clearly appreciate the benefits of a truly integrated CX data strategy to support their sales and marketing goals - both in terms of the customer experience offered and their own operational efficiency.

They also recognise that there's often a significant gulf between their current siloed reporting approach and the goal of a more robust decision support and automation capability.

So how does an organisation begin such a journey? First, it's important to recognise where you're starting from. There's also a significant difference here between an organisation's Sales and Service Journeys. Sales tends to have a lot more historical investment in AI, Machine Learning and analytics tools than its Service counterpart. However, given the bottom line impact of service failure, it's clear that there's a potential imbalance here in the typical technology investment profile. At Sabio we see Customer Journey Insight progressing through four key levels:

LEVEL 1 **Descriptive:** Reporting on what happened
LEVEL 2 **Diagnostic:** Explaining why things happened
LEVEL 3 **Predictive:** Projecting what will happen
LEVEL 4 **Prescriptive:** Saying what should be done

For most customer service operations, the starting point is Level 1 enabled by a mix of mix of basic descriptive reporting tools from their digital operation - their IVR, reports from their contact centre call management system as well as their existing WFO quality monitoring and recording. These datasets typically report on aggregated real time or historical data, and are usually offered as discreet reporting tools and treated separately.

Moving up to Level 2, a series of digital, customer user interface, self-service, routing, advisor and customer feedback reporting options exist that offer more diagnostic insight – going beyond what happened to focus on why things took place. Examples here could include detailed web chat, virtual assistant and natural language call steering reports, more in-depth speech analytics capabilities, contact centre voice traffic analysis, as well as voice of the customer and benchmarking solutions.

While the contact centre industry has relied on tools for years – such as Workforce Management and Intelligent Call Routing (ICR) - to make forecasts, these have been based on largely simple algorithmic formulas. ICR, for example, makes assumptions based on why someone is calling into a contact centre, and relies on fixed rules to draw its conclusions.

Transitioning to more predictive capabilities

The next level of CX data analytics – Level 3 - takes these predictive capabilities further, drawing on multiple datasets and linking them together to begin addressing key questions such as what will happen, what's the next best action and what are customers likely to do next.

Bringing these datasets together allows organisations to bring their Customer Journey mapping activities to life, visualising every journey and gaining a much greater understanding of different touchpoints and how they work together. Capturing detailed data from every single interaction helps to inform and improve individual outcomes, while aggregating all these personal experiences will also prove invaluable for overall process performance and customer journey improvements. This level of Customer Journey Analytics and Visualisation enables root cause analysis – allowing the reverse engineering of journeys and the ability to map these against other customer experiences.

This is particularly important as it allows CX teams to make data-driven connections, enabling them to reach out to potentially unhappy customers who may be at risk of churning. Recent White House research suggests that only 1 out of 26 unhappy customers complain – so even though only that one customer may have given a particularly low 1/10 feedback score that doesn't mean that others didn't experience a similar service level. With Smart Customer Journey Analytics, organisations can move beyond traditional predictive capabilities to identify those potentially silent yet unhappy customers who otherwise might have been ignored.

Enabling a new generation of AI-powered prescriptive CX

The final stage – Level 4 - becomes more complex as it involves taking multiple outputs from predictive CX data analytics to enable a new generation of prescriptive tools and capabilities that offer a clear insight into customer journey progression and what the CX operation should do next.

This inevitably means making complicated real time decisions about specific customer journeys and taking the most appropriate action to achieve desired outcomes. This could involve tracking a customer's online activity, seeing how they're moving around a website and what pages are being clicked, and building up a machine learning powered behavioural model driven. Adopting this kind of prescriptive approach enables CX teams to operate at scale, using their engagement models to support automated decision making while still treating every single journey as unique.

What's important here is that a brand's Big Data models, driven by machine learning inputs from across the customer journey and expanding to embrace huge data sets, are constantly updated based on precise outcome measurements from every single customer experience. With such massive data sets it becomes impossible for even the most skilled CX analysts to sift through and surface meaningful data, so the application of AI tools and techniques are critical if brands are to successfully evolve their prescriptive models based on multiple actual outcomes from each customer's experience.

Understanding actual outcomes and closing the loop by constantly feeding journey data back into the model is an essential requirement if organisations are to succeed in tuning their CX strategies correctly. Recognising that a balance needs to be struck between achieving the right customer service results at scale and securing optimal outcomes for the business, CX teams will add value by knowing how to fine-tune their prescriptive models to address both requirements.

No time to lose, and don't wait for the perfect data set

Regardless of where you're starting from, the good news is that taking steps to integrate multiple CX data sets and applying machine learning techniques to surface intelligence can unlock significant benefits.

Uncovering insights into potential issues impacting the flow of interactions between digital and contact centre operations, for example, can yield orders of magnitude improvement, whether that's in terms of better performance from digital assets or successfully deflecting demand from the contact centre. There's certainly a growing gap between those organisations that simply report on what's happened, and those busy leveraging relevant CX data to both anticipate and address customer requirements.

At Sabio we believe that very few organisations that currently have a truly integrated CX data strategy in place, so there are considerable differentiation opportunities for those brands that seize the initiative here.

That's why it's important for CX teams to get serious about measuring customer journey outcomes and start building out their data sets. The models you create don't have to be perfect for you to start unlocking value, indeed large and imperfect is always going to be a good place to start if machine learning is to do its job properly.

Sabio Insight empowers you to get more from your data by breaking down your customer engagement reporting silos. The Sabio Insight team enables true cross-platform and cross-channel analytics, then works with your CX team to map performance across end-to-end customer journeys, providing your organisation with the insights required to power next generation predictive and prescriptive customer engagement strategies.

How far have you progressed on your own CX data journey? Key questions to ask:

- Have you begun to integrate your multiple CX data sets?
- Do your CX reports still focus on what's happened rather than what customers are asking now?
- What steps have you taken to measure your customer journey outcomes?
- Are you able to track customer interactions across both your digital and contact centre operations?
- Have you investigated applying machine intelligence techniques to surface new customer insights?

5. Getting more from your CX data with Sabio Insight

Sabio Insight helps provide brands and their customer engagement operations with the smart data that helps them see ahead and stay ahead.

Starting from initial CX reporting data audits through to more in-depth Contact Centre Insights, Customer Journey Analytics and Customer Journey Orchestration initiatives, Sabio Insight has both the solutions and services required to help its customers drive further operational and financial value from their CX programmes, and is also focused on supporting engagement with AI-enabled machine learning datasets such as WFO Sentiment Analytics. Key Sabio Insight offerings include:

Contact Centre Insights:

A portfolio of solutions focused on measuring, analysing and understanding and optimising the productivity and effectiveness of the contact centre operation, with the goal of: unlocking productivity improvements and securing better outcomes through more effective contact routing:

- Improving productivity by optimising the forecasting and scheduling of resources to meet demand
- Establishing optimal service levels (SLAs) and scoring customer sentiment
- Benchmarking CSAT performance against broader industry and vertical best practice
- Capturing and analysing verbatim customer feedback
- Advising on actions and tracking CX improvements

Customer Journey Analytics:

Covering a range of advanced CX data collection, visualisation, benchmarking and predictive capabilities that help customer experience teams to understand more about why their customers are contacting them. Target benefits include reducing bad demand by identifying process and experience improvements, focusing contact centre staff on value creation, and tracking the business impact of demand management and CSAT improvements. Capabilities include:

- Journey visualisation
- Tracking and benchmarking customer demand – website leakage, contact reasons, outcomes, CX
- Gathering and analysing customer intent through conversational technologies
- Identifying and eradicating bad demand – refining processes and improving the digital experience

Customer Journey Orchestration:

With a suite of solutions focused on using data to drive real-time decisioning, customer journey orchestration helps organisations to improve both sales performance as well as delivering excellent CX outcomes for customers. A focus on data and machine learning driven orchestration supports a range of capabilities including:

- Proactive communications
- Targeting
- Routing
- Coaching

This is all supported by a series of predictive models looking at demand quality, complaints, fraud, churn, effort, sentiment, propensity to buy that help optimise CX performance to deliver optimum outcomes for both brands and their customers.

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6. Building brilliant customer experiences

The Sabio Group, which includes Sabio, DatapointEurope, Bright UK, flexAnswer, Callware, TeamVision and DVELP delivers solutions and services that seamlessly combine digital and human interactions to support outstanding customer experiences.

With its combination of User Experience and Customer Journey solutions, backed by an in-depth CX analyst team with experience of delivering some of the world's most innovative CX solutions across both multiple sectors and regions, Sabio Group is ideally placed to help your organisation transform its service.

Through its own technology and that of world-class technology leaders such as Avaya, Verint and Twilio, Sabio Group helps organisations to optimise their customer journeys by making better decisions across their multiple contact channels.

The group works with major brands worldwide, including the AA, Aegon, AXA Assistance, Bankia, BGL, BNP Paribas, Caixabank, DHL, Essent, HomeServe, Liverpool Victoria, Office Depot, Saga, Sainsbury's Argos, Telefónica, Think Money and Transcom Worldwide.

AVAYA

Sabio also has over 10 consecutive years' experience as an Avaya Connect Platinum Business Partner, ensuring in-depth understanding of the broader contact centre technology environment

Sabio can also offer a consolidated support contract, with the ability to genuinely offer third line end-to-end support for all elements of an Employee Optimisation or Customer Management solution from its specialist Support Centre in Glasgow

Sabio has the experience and skills to design and deliver integrated solutions that meet the specific challenges of the contact centre, from Workforce Optimisation to speech-based self-service applications to major virtualisation projects

VERINT

Sabio has been a Verint Platinum Partner since 2000, and is certified to deliver the latest Enterprise Workforce Optimisation suite, consultancy and training via its dedicated Workforce Optimisation centre of excellence

Award Winning - Sabio's unique combination of proven expertise and in-depth Employee Optimisation and Customer Management skills ensure that the company is a multiple award winner

Sabio takes full accountability for a project by delivering an end-to-end solution using its own people and not relying on third parties to provide skills and knowledge

Sabio operates without external investment, debt or reliance on external finance – ensuring the freedom to develop its business in the best interest of customers

Sabio has developed a comprehensive WFO modelling approach that allows businesses to find out exactly how much business value could be unlocked from an effective Employee Optimisation or Customer Management deployment

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The information contained in this brochure is subject to change