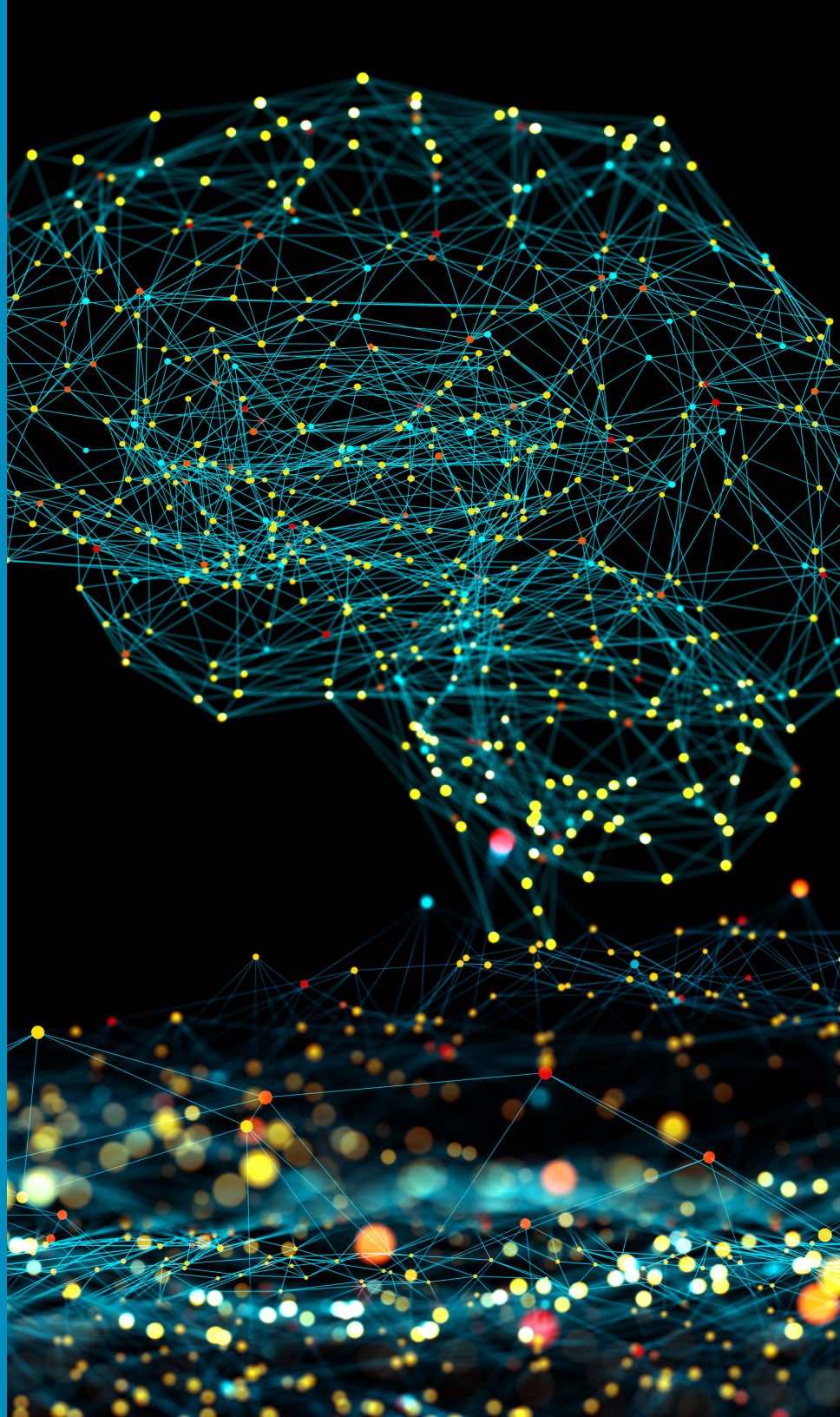
GUIDE

Getting Started with AI

Your guide to building a competitive edge and delivering the best customer experiences



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INTRODUCTION

Artificial Intelligence—your new competitive edge

Customer expectations are evolving quickly. They expect you to know who they are, what they need, and how and where to respond to their every request—now. They're always on the move, multi-tasking to make the most of every second. They crave simple, personalized service at the sound of their voice or touch of their finger. At the same time, contact center technology is rapidly evolving to keep pace not only with the latest digital channels but the growing web of disparate customer data.

You want to provide customers with superb customer experiences but it's challenging to provide truly personalized interactions when your data is siloed across departments and systems. You'll fall short of meeting your customers' needs if you cannot assimilate a full picture of who they are or if doing so involves cumbersome, multi-step journeys or costly data migrations. Worse yet, you'll lag behind your competitors who are already leveraging AI in their contact center to level-up their customer experience.

Getting started with AI can seem overwhelming but the risks are greater to delay. The opportunity lost to less flexible legacy applications and systems extend beyond financial cost. Traditional self-service continues to frustrate customers and tuning exercises designed to optimize speech recognition become more time intensive and ineffective.

Meanwhile, companies that choose to introduce AI in their customer service processes stand to

- Increase loyalty and engagement
- Deliver more personalized and relevant experiences
- Improve operational efficiency and effectiveness
- Boost employee productivity

With proven methodology and flexible best-fit AI options, Waterfield Technologies simplifies the process, reducing implementation timelines and accelerating ROI. Here's how to get started with your own AI journey and start delivering your best customer experiences today.

ARTIFICIAL INTELLIGENCE

A smart approach to better customer service

Artificial Intelligence is defined as an area of computer science that emphasizes the creation of intelligent machines that learn and adapt without specific human instruction. But how does it apply to your contact center? In short, AI is the key to gathering, organizing and deriving meaning from your data—instantly analyzing patterns and unlocking customer insights that otherwise would be out of reach. It extends far beyond human processing speed and capabilities, predicting outcomes based on learned behavioral pattern recognition and making intelligent decisions that redefine business rules.

In practice, there are two ways in which AI integrates within the contact center: conversational interfaces and back-office efficiencies. Conversational AI is channel-based, directly engaging with customers in natural language across a multitude of voice and digital channels to provide support and enhance the user experience. Back-office applications of AI work to increase the efficiency of people and processes. Assisting agents in predicting intent, locating information and intelligently recommending the best path to resolution.

Integrating AI within your contact center provides you with the tools needed to deliver uniquely tailored, intent-driven customer service regardless of channel or input method. The infographic to the right demonstrates a few examples of how AI is benefiting the contact center.

Influencing sales

3 in 4 organizations implementing AI increase sales of new products and services by more than 10%

Boosting operations

78% of organizations implementing AI increase operational efficiency by more than 10%

Engaging the customer

75% of organizations using AI enhance customer satisfaction by more than 10%

Generating insights

79% of organizations implementing AI generate new insights and better analysis

Source: Capgemini Digital Transformation Institute, State of AI survey, N=993 companies that are implementing AI

THE PROCESS

A proven approach to applied AI

Waterfield has been helping companies evolve their legacy contact center technologies into modern digital powerhouses for over 30 years. We know taking the first step in your AI journey might seem intimidating, but experience partnering with organizations in the early stages of AI has shown that with the right planning process, you can quickly be on your way to reaching new levels of engagement. Our proven discovery model provides a clear path forward to defining your business case for AI and developing a roadmap focused on achieving business results—in four simple steps.

STEP 1

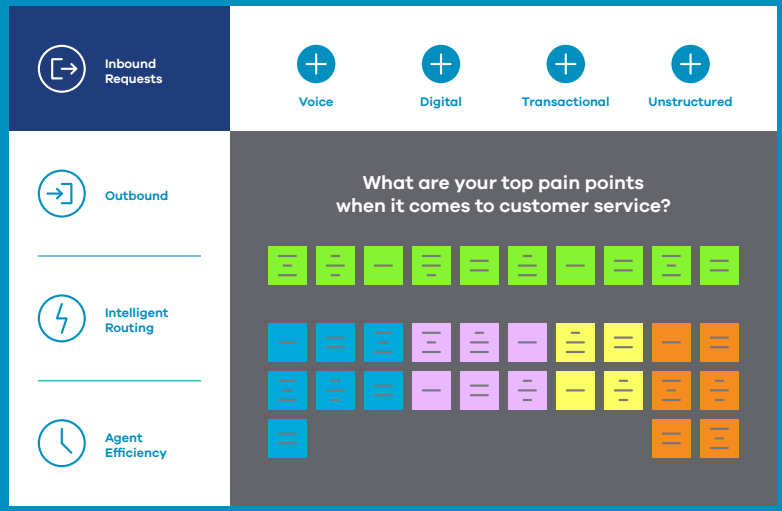
Identify pain points and business needs

Start by assessing your pain points. Bring both business and technical stakeholders to the table to establish a common understanding of current challenges.

For example, you might start by asking

- What are the top reasons customers are contacting you? What are their top issues?
- What are the biggest barriers your customer service process?
- How often are you able to resolve their request on their first contact?
- Are processes or data silos standing in the way of employee productivity and efficiency?
- What are your greatest pressures as a business?
- Is your customer service too costly?

As you discuss, write down your top sources of friction and categorize each according to service channel, function and persons impacted—customer, employee or business.



Use sticky notes to capture your pain points. Assigning a unique color to each channel or function will aid in quickly grouping similar opportunities.

STEP 2

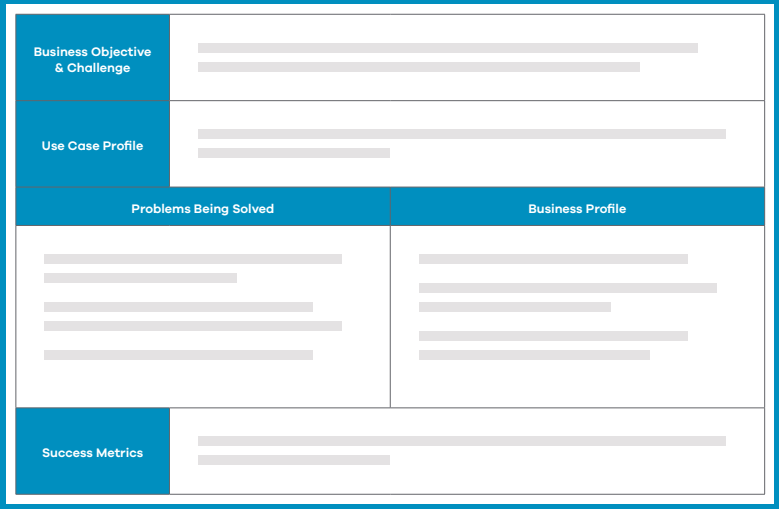
Align objectives and ideate

Now that you've identified your pain points and the impact they have on your customer, employees and business—consider how AI could solve for each and turn your challenges into opportunity. Elaborate on your initial discussions. Document how AI can be used to address your pain points and the business value behind each opportunity.

Using the included **AI Use Case Development** worksheet detail

- Business Case: What problem are you addressing and what measurable result do you expect to achieve?
- Channels: What communication avenues are impacted—voice, SMS, digital?
- Data: Where is your data stored? What teams would need to be engaged?
- Technology: Does the solution affect telephony, CTI/Agent desktop or backend systems?
- Viability: How would current or planned initiatives impact availability of these systems?

Your use cases should be aligned to your organization's service and support goals and will help define recommended business steps as you build your roadmap to differentiated customer engagements.



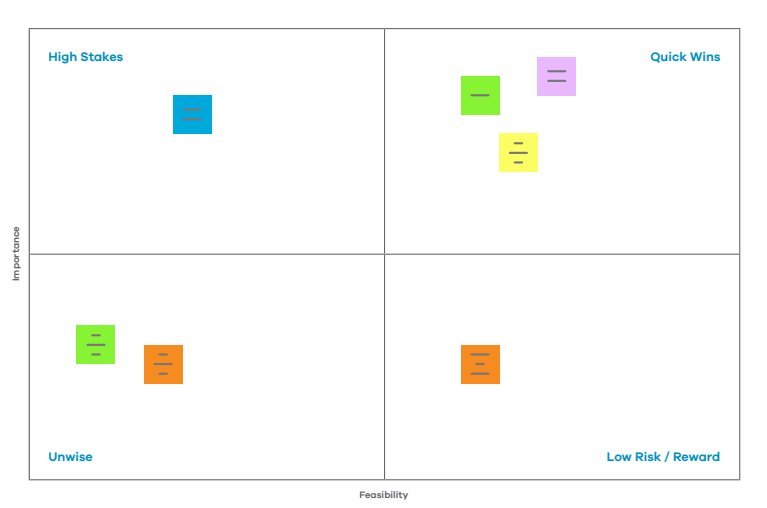
Aligning your AI use cases to larger organizational initiatives can help boost stakeholder support and secure initial funding.

STEP 3

Prioritize work efforts

While it can be tempting to solve every opportunity out the gate, it is often difficult to secure funding and timely to implement such large initiatives. Successful AI journeys are purposefully paced to maintain focus on achieving business results first—reducing risk and building a solid foundation for future developments.

Carefully assess each documented use case and prioritize based on value and contribution to business goals as well as overall complexity. Those that score high in both importance and feasibility are where you should start. Use the momentum and support gained through these quick wins to secure sponsorship for continued integration and future projects.



Draw the prioritization quadrant on a white board. As you discuss the importance and feasibility of each use case, place the corresponding sticky note from Step 1 in the appropriate square.

STEP 4

Define success

When you invest in your customer experience you expect the solution to deliver measurable business results. But how you measure these results, and the overall success of your AI journey, is as unique as the experiences you deliver.

Use this checklist as a guide to help define success requirements for your AI solution.

- ☐ Accelerate AI solution ROI/time to value
- ☐ Improve first contact resolution
- ☐ Reduce average hold time
- ☐ Improve speed of service
- ☐ Increase Net Promoter Score (NPS)
- ☐ Reduce customer churn
- ☐ Boost employee satisfaction (eNPS)
- ☐ Decrease voice response maintenance
- ☐ Drive new sales opportunity
- ☐ Simplify technology integrations
- ☐ Increase customer lifetime value

Investing the time to thoroughly put this four-stage process into practice is the first step to building a successful AI strategy. With your AI journey now defined, you'll be on your way to providing your customers with superb, data driven experiences that are personalized, predictive and contextual.

If your contact center is struggling to keep pace with today's increasingly difficult customer expectations and business demands, Waterfield Technologies is here to help. We'll work with you to evaluate your business and technology needs, identify opportunities for increased automation and apply proven strategies to reduce the risk and complexity of AI and customer experience solutions.

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AI for Customer Service

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Top Pain Points

Business Objectives

Where to Start

Timeline

Goal	Step 1	Step 2	Step 3	Future

AI Use Case Development

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Business Objective & Challenge	
Use Case Profile	

Problems Being Solved	Business Profile

Success Metrics	

Use Case Prioritization

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High Stakes	**Quick Wins**
Unwise	**Low Risk / Reward**

Importance

Feasibility

Success Requirements Checklist

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