



AI guide  
for your business



# Areas to focus

1. Understanding your audience
2. Creating your AI Strategy
3. Choosing the right solution provider
4. Customer touchpoints
5. Data & Security

# Understanding your Audience

# Your Audience

## Who are they

– create customer personas to describe who they are, where they live, what they like and dislike

## How do they interact with us

– create customer journeys to visually describe this

## How do we support them

– create Service Design blueprint to show supporting processes, systems and people.



# Customer Personas

One of the biggest mistakes we make is not developing a deep enough understanding of our customer's needs and therefore make a lot of assumptions about how to solve issues for them. That's why creating customer personas is so important.

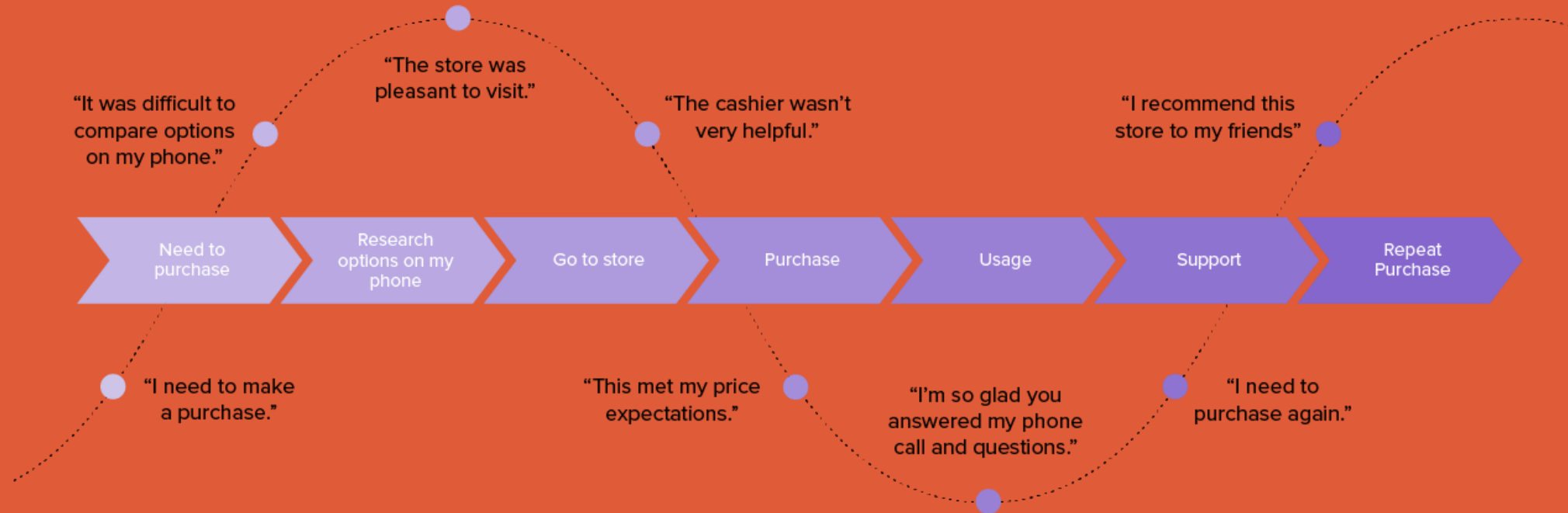


A customer persona is a semi-fictional archetype that represents the key traits of a large segment of your audience, based on the data you've collected from user research and analytics.

# Customer Journey Map

A customer journey map is a visual storyline of every engagement a customer has with your service, brand, or product. The customer journey mapping process puts the organisation directly in the consumer's mind to better understand the customer's processes, needs, and perceptions.

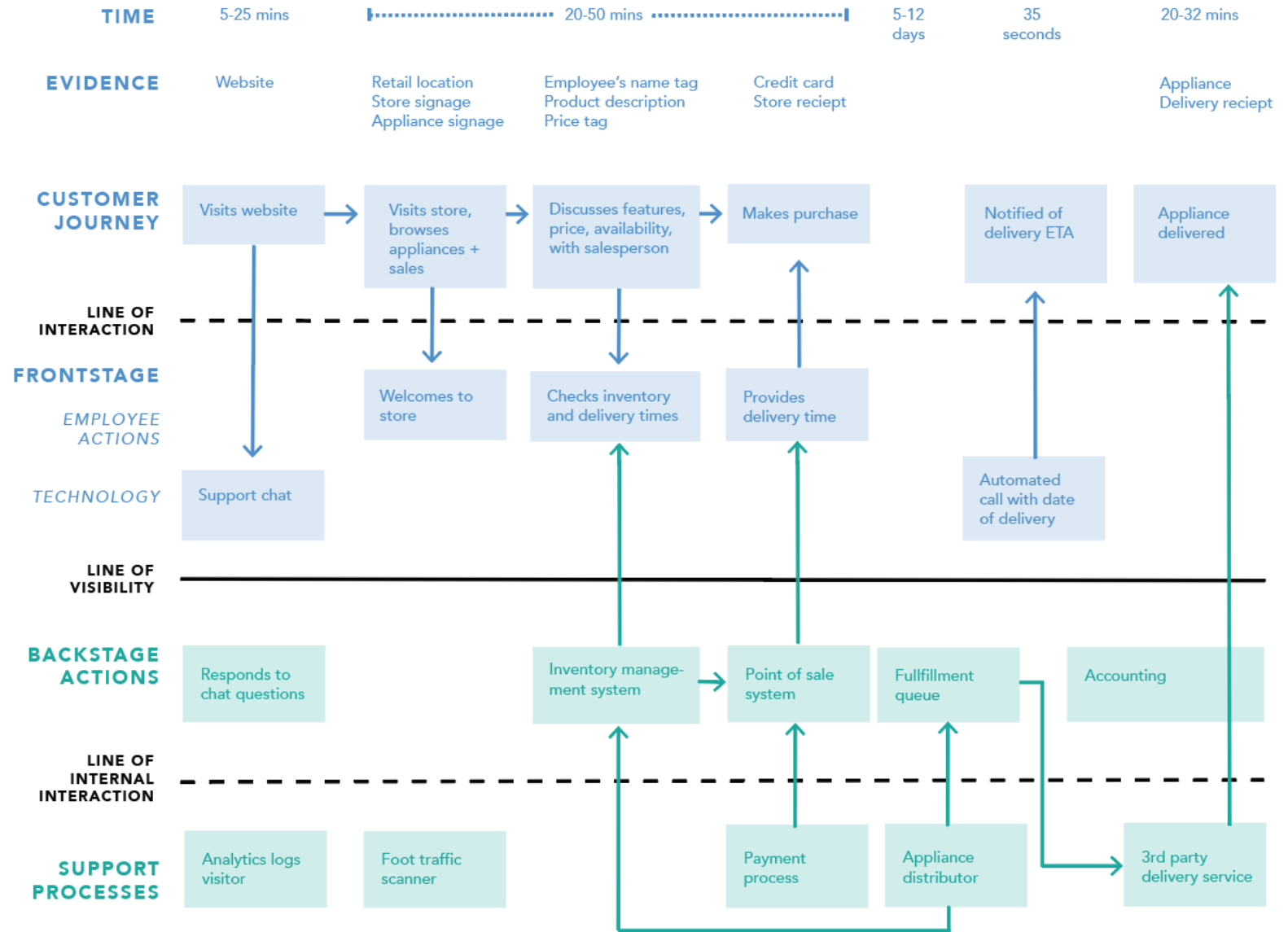
## Retail customer journey



# Service Blueprint

A service blueprint is a diagram that displays the entire process of service delivery, by listing all the activities that happen at each stage, performed by the different roles involved, identifying areas of improvement whether process, systems or people.

## SERVICE BLUEPRINT *Example*



# Creating your AI Strategy



# Establish your vision

At the outset, it is important to ask why you looking to implement AI and how will it add value to your business

**Link to overall company vision and state how AI will support that vision**

**Map AI use cases to major goals that company has identified**

**Set AI Success Metrics that can be measured easily**

**Assess & Mitigate Risks in collaboration with the right stakeholders internally**

# AI success metrics

Identify appropriate success metrics for your business goals and link them to potential AI use cases.

<b>Business Goal</b>	<b>Appropriate Success Metric</b>
<b>Improved customer satisfaction</b>	Customer satisfaction index/Net Promoter Score
<b>Topline revenue growth</b>	Revenue growth for product lines
<b>New business initiatives</b>	Number of new business initiatives
<b>Task or process automation</b>	Reduction in processing time
<b>Reduce costs</b>	Reduction in CapEx and OpEx
<b>Staff augmentation and increased productivity</b>	Workforce productivity metrics, such as time spent on value-added tasks
<b>Improved service availability</b>	% of annual availability

# Use case prioritisation

At this stage, you may have identified use cases already or surface them through the service blueprint exercise described. It is important to evaluate each use case and rank them 1-10 in terms of technical and business factors which you have determined.

## Technical Factors

Access to  
Data

Technical  
Feasibility

People/Skills  
to execute

## Business Factors

Align with  
our Values

Sponsor  
Support

Measurable  
KPIs

# Stakeholder Alignment

Like most organisations, you will have internal processes and compliance rules to navigate in defining your strategy.

It is important early on, to engage with the right people so you can identify barriers and risks early in the process.

Some examples:

**Regulatory** - Enable collaboration between AI practitioners and legal, risk and security members to evaluate use case feasibility and acceptable risks

**Reputational** - Ensure enterprise security controls, data integrity and AI model monitoring.

# Key Takeway



By linking your strategic goals to potential AI use cases, you can articulate the value to the relevant stakeholders in the business

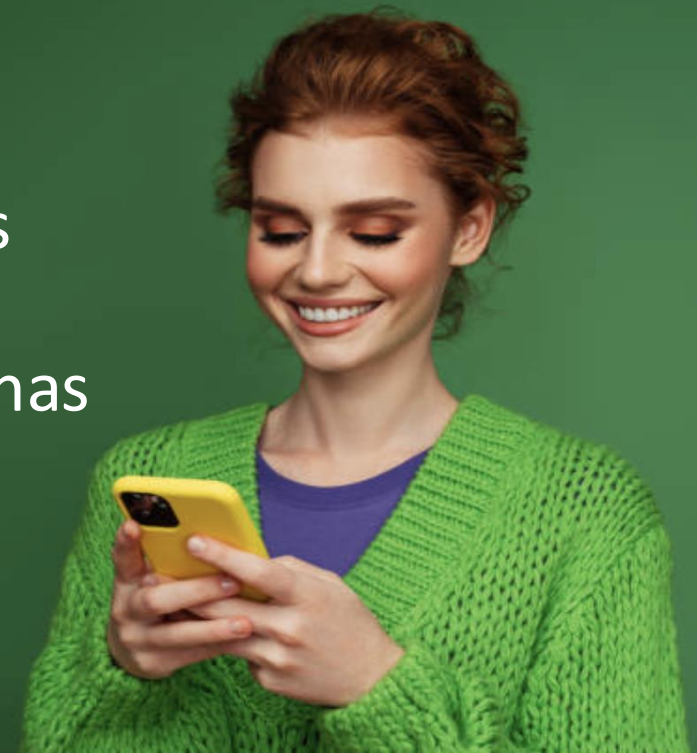


By identifying risks or barriers early, you can ensure stakeholders are involved in evaluating use cases and creating mitigations rather than blockers.

**Choosing the right solution provider**

Choosing the right solution partner to support you on your AI journey is critical to success

Some providers have good point solutions but it's important to take a holistic view of your business needs as managing a multi-vendor AI ecosystem has its own challenges.



# Checklist for choosing a provider

Experience & Expertise	<p>Check if the provider has relevant experience in your industry and with similar projects.</p> <p>Evaluate the expertise of their team, including data scientists, engineers, and domain experts.</p>
Proven Track Record	<p>Look for case studies, testimonials, and client references to gauge the provider's track record of successful projects.</p> <p>Verify the provider's credibility through reviews on platforms like Clutch or Gartner Peer Insights.</p>
Technology Stack	<p>Assess the provider's technology stack and ensure it aligns with your project requirements.</p> <p>Consider whether they offer scalable and flexible solutions that can adapt to future needs.</p>



# Checklist for choosing a provider

Data Handling & Security	<p>Inquire about their data handling practices, including data privacy, security measures, and compliance with regulations like GDPR or HIPAA. Ensure they have robust protocols for data governance, encryption, and access control.</p>
Customisation	<p>Determine if the provider offers customisable solutions tailored to your specific needs.</p> <p>Assess their flexibility to accommodate changes in requirements or scale the solution as your business grows.</p>
Deployment Options	<p>Evaluate whether the provider offers on-premises, cloud-based, or hybrid deployment options.</p> <p>Consider factors like latency, scalability, and cost implications associated with different deployment models.</p>

# Checklist for choosing a provider

Support & Maintenance	<p>Enquire about their support services, including response times, maintenance schedules, and escalation procedures.</p> <p>Ensure they provide adequate training and documentation to empower your team to use and maintain the solution effectively.</p>
Cost & ROI	<p>Request transparent pricing and a breakdown of costs, including licensing, implementation, and ongoing maintenance.</p> <p>Evaluate the potential return on investment (ROI) of the solution based on its impact on your business goals.</p>
Ecosystem	<p>Check if the provider has partnerships with leading technology vendors, which can indicate their credibility and access to resources.</p> <p>Consider their ecosystem of third-party integrations and support for interoperability with existing systems.</p>

# Checklist for choosing a provider

Scale & Future Roadmap	<p>Assess the provider's ability to scale the solution to accommodate future growth and evolving requirements.</p> <p>Inquire about their roadmap for product enhancements, updates, and support for emerging technologies.</p>
Communication & Collaboration	<p>Evaluate the provider's communication channels, responsiveness, and willingness to collaborate closely with your team.</p> <p>Ensure they provide regular progress updates, project milestones, and clear channels for feedback and communication.</p>

# Key Takeaways



Choosing a credible partner solution is critical to the success of your plan



Working with the partner to create the business case showing ROI will strengthen the case as they will have real world KPIs that they have achieved with others.



If you are implementing a number of AI use cases, it makes sense to ensure you use one partner or if several partners are required then ensure no AI silos are created



*“When selecting a solution partner, it’s important to make sure their product vision aligns with yours in terms of solution features, security and integration. Good partners will also offer a transparent view of past service performance and reliability via a Trust site or similar.. “*

*Paul Walsh, Chief Technical Officer ,Workair*



# Customer Touchpoints

# Customer touchpoints

As businesses implement an omni-channel approach, it is important to ensure consistency across any AI solution proposed.

Typical touchpoints:

- Email
- Website
- Webchat
- App
- SMS
- Voice call

AI can address a number of these through Virtual Agents and Automation



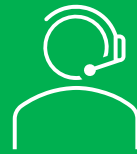
# Customer touchpoints

For contact centres, there are 3 pillars where AI can be deployed.



Before the Call

- Identify intent
- Automatic Resolution
- Predictive call routing



During the Call

- Passing context
- Agent assist
- Real time transcripts



After the Call

- Wrap up summary
- Sentiment Analysis
- Call insights



# Before the Call

**Virtual Agents** - Before the customer reaches the agent, AI can be deployed as a Virtual Agent or Intelligent Virtual Assistants (IVA) removing the need for an IVR and assisting the customer with their query or routing the call to most appropriate agent.

The Virtual agent can be deployed via Chat or Voice, connected to all back end systems so it can take actions to complete what the customer requires.

- Understands natural language inputs and interprets requests.
- Answer FAQs
- Provide recommendations.
- Assist transactions.
- Schedule appointments.
- Repetitive tasks



# Before the Call – example use case

## Bill Query- Why is my bill so high?

One of the most common call drivers from customers is Billing.

The Virtual agent can deflect these queries from agents and assist the customer.

Understanding the intent and even the sentiment of the customer, the VA can validate the customer through your existing ID&V process.

Having access to the billing data, the VA can explain to the customer why there are additional charges on their account, assist in taking payment or direct to the correct agent.



# During the Call

When the virtual agent passes the customer to an agent, it also passes the context of the call so far. This removes the need for ID&V and repeat questions to the customer which reduces the overall call handling time and increases the customer experience

The AI is still working in the background during the call, listening to and transcribing what is said both from the customer and the agent.

This allows the AI to support the agent by

- Triggering prompts for the agent to say
- Making them complete compliance process
- Searching and providing knowledge articles to the agent
- Automating back ground tasks such as populating other systems.



## During the Call – example use case

### Identifying Upsell opportunity

As the customer is talking with the agent, the AI assistant is listening for keywords that will identify an upsell opportunity and monitoring the customer sentiment to find the right time for the agent to mention it.

The customer starts with a negative sentiment as they have an issue, the Agent is able to resolve this and the AI knows this customer is due an upgrade on their account (from the CRM data). Once it detects the customer sentiment has turned positive, it will inform the agent to propose the offer.



# After the Call

After the call, the agent usually has some tasks to complete before their next call. This is typically writing up a summary of the call (often done during the call which increase call handling time).

The AI assistant can summarise the conversation for the agent, identifying key points as it has transcribed the whole conversation. The Agent can amend this if needed and submit. This ensures consistent data populated in your CRM.

The AI assistant can also complete background tasks to populate other systems or trigger other events ( RPA – Robotic Process Automation)



# After the Call – example use case

## Predictive NPS score

As every call is recorded and transcribed, AI can report on customer sentiment .

This can lend itself to predicting overall customer NPS rather than a sample of customers.

The sentiment data can even be appended to your existing quality reporting to enhance insights.





# Realise the Value of Conversations Across Customer Journeys

Assisting customer journeys across channels. e.g.,

- Make a reservation
- Make changes
- Refunds
- Disruptions

## CONVERSATIONAL SELF-SERVICE

Intelligent virtual agents guide customers on voice, visual and messaging modalities and boost self-serve rates.

## REAL-TIME AGENT GUIDANCE

Customers connect with live agents when needed. Agent Assist guides new and seasoned agents with in-call coaching.



## CONVERSATIONAL ANALYTICS

Customized analytics provides in-depth understanding of call drivers, agent performance, and compliance adherence.

## AFTER-CALL WORK AUTOMATION

Call categorization and call summarization are generated automatically, saving time and improving the next customer interaction.

## PROMISE MANAGEMENT

Promises made by agent are automatically identified and tracked to ensure fulfillment.



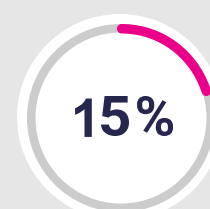
Reduction in Customer Effort



Improvement in Self-Service Rates



Improvement in CSAT / NPS



Improvement in Sales Effectiveness



Reduction in Contact Center Onboarding Time



Reduction in Avg Handle Time



Improvement in First Contact Resolution

# Key Takeaways



AI has huge potential to reduce waiting times and call handling times. The ROI on these is measurable and can help you build your business case



Whether reducing training times, ensuring compliance, upselling & cross-selling, AI can drive these metrics



With AI analytics you get enhance insights into your customer, your agents and your business.





# Data & Security

# Data

The use of data analytics, BI applications, and data warehouses for structured data is a mature industry, and the strategies to extract value from structured data are well known. But the emerging explosion of generative AI now holds the promise of extracting hidden value from unstructured data as well.

AI use cases also hold the promise of helping enterprises create new outcomes by gaining insights previously hidden in large volumes of unstructured file data. This data is typically stored in multiple locations in data centres and across multiple clouds. The solution is now available to utilize all data – structured, semi-structured and unstructured – in AI to create new business value as well as to drive efficiencies.



# Data

But as diverse as the AI use cases are, the common denominator among them all is the need to collect data from many diverse sources, and often different locations.

The main question to ask is how quickly can we implement AI pipelines without costs, within governance controls, and complexity spiraling out of control



# Security

As AI evolves, guardrails are becoming increasingly important for maintaining public trust in AI and ensuring that AI-enabled technology operates safely within ethical and legal boundaries. AI guardrails are a critical component of AI governance and the development, deployment and use of responsible AI. In the past year, guardrails have often been mentioned in the context of generative AI, but it's important to remember that safeguards are vital considerations for any type of AI system that can make a decision autonomously.

AI guardrails can be implemented with technical controls, policies and laws. Technical controls are embedded within the AI itself. In contrast, policies are internal or external guidelines, and laws are enforceable regulations enacted by governments.

# Key Takeaways



Access to the right data is critical for a successful AI implementation.

Understanding your constraints or challenges with data early in the process will determine the right use cases to implement for quick wins.



Working with your solution provider to ensure security controls are in place to satisfy internal stakeholders

# Useful Terms

**RPA** stands for Robotic Process Automation. It is a technology that uses software robots or "bots" to automate repetitive, rule-based tasks that are typically performed by humans. RPA bots interact with computer systems and applications just like humans do, by mimicking clicks, keystrokes, and data entry.

**Machine Learning (ML):** A subset of AI that involves algorithms that allow computers to learn from and make predictions or decisions based on data, without explicit programming.

**Natural Language Processing (NLP):** The branch of AI focused on enabling computers to understand, interpret, and generate human language in a way that is meaningful and contextually relevant.

**Sentiment analysis:** The process of identifying and categorizing opinions in a piece of text, often with the goal of determining the writer's attitude towards something.

**"Hallucinations"** in the context of AI typically refers to situations where artificial intelligence systems generate outputs that are not based on real data or experiences but rather are imagined or fabricated by the system itself.

**Underfitting:** When your model does not have enough training examples to learn from appropriately.

**Overfitting:** When your model has too many parameters and learns the noise in your training data instead of the underlying pattern

**Variance:** The amount that the intended function of a machine learning model changes while it's being trained. Despite being flexible, models with high variance are prone to overfitting and low predictive accuracy because they are reliant on their training data.



Please contact us if you have any questions or require more information.

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