FROM THE PERIPHERY TO PRIME TIME:
HOW AI AND DATA ARE DRIVING THE CUSTOMER EXPERIENCE

Jarlath Forde

Vice President, Solutions

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Sapient Consulting combines technical and digital expertise with a deep understanding of how industries operate to enable meaningful transformation and business process modernization.
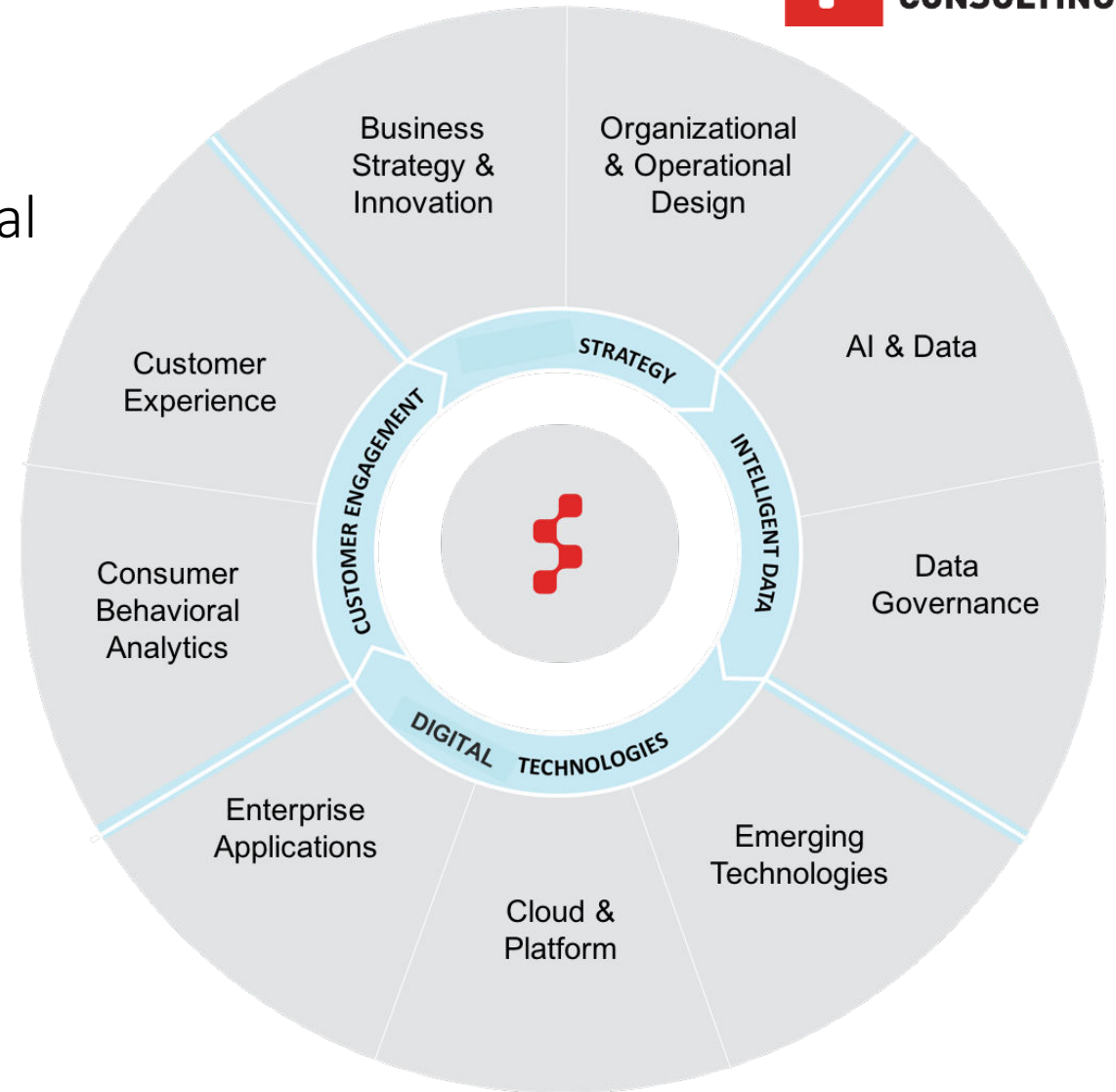

COMMODITIES

FINANCIAL SERVICES

HEALTH

PUBLIC SECTOR

Business Strategy & Innovation

Organizational & Operational Design

Customer Experience

AI & Data

Consumer Behavioral Analytics

Data Governance

CUSTOMER ENGAGEMENT

STRATEGY

INTELLIGENT DATA

DIGITAL TECHNOLOGIES

Enterprise Applications

Emerging Technologies

Cloud & Platform

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# A LONGSTANDING PARTNERSHIP WITH SMART COMMUNICATIONS

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- United in our focus to optimize and transform the way that our clients do business

- 7+ year-old partnership

- Sapient Consulting is the preferred offshore team for all Smart Communications customers

2010
First joint project at Tier 1 US investment bank

2011
Sapient and Smart Communications work as partners with WSI on large implementation at a major UK oil company

2012
Assisted in devising strategy for the transition to the SaaS solution and identified opportunities for the new platform

Engaged in an advisory capacity to assist with marketing effort around SmartDX™

2013
Provided analysis for Smart Communications of the buy-side and identified opportunities for the SaaS platform within that community

Managed WG for industry participants to inform the product roadmap and foster collaboration

2014
Assisted with design and execution of the industry pilot for SmartDX platform

The first vendor to build industry templates to be offered in 2015 centrally via SmartDX to Smart Communications clients

2017
Smart Communications and Sapient Client Connect are integrated to help institutions attract, engage, retain and service clients.

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A good customer experience is one that provides at-the-ready (digital) assistance, proactive engagement based on customer touchpoints and products/services that meet their constantly changing needs.

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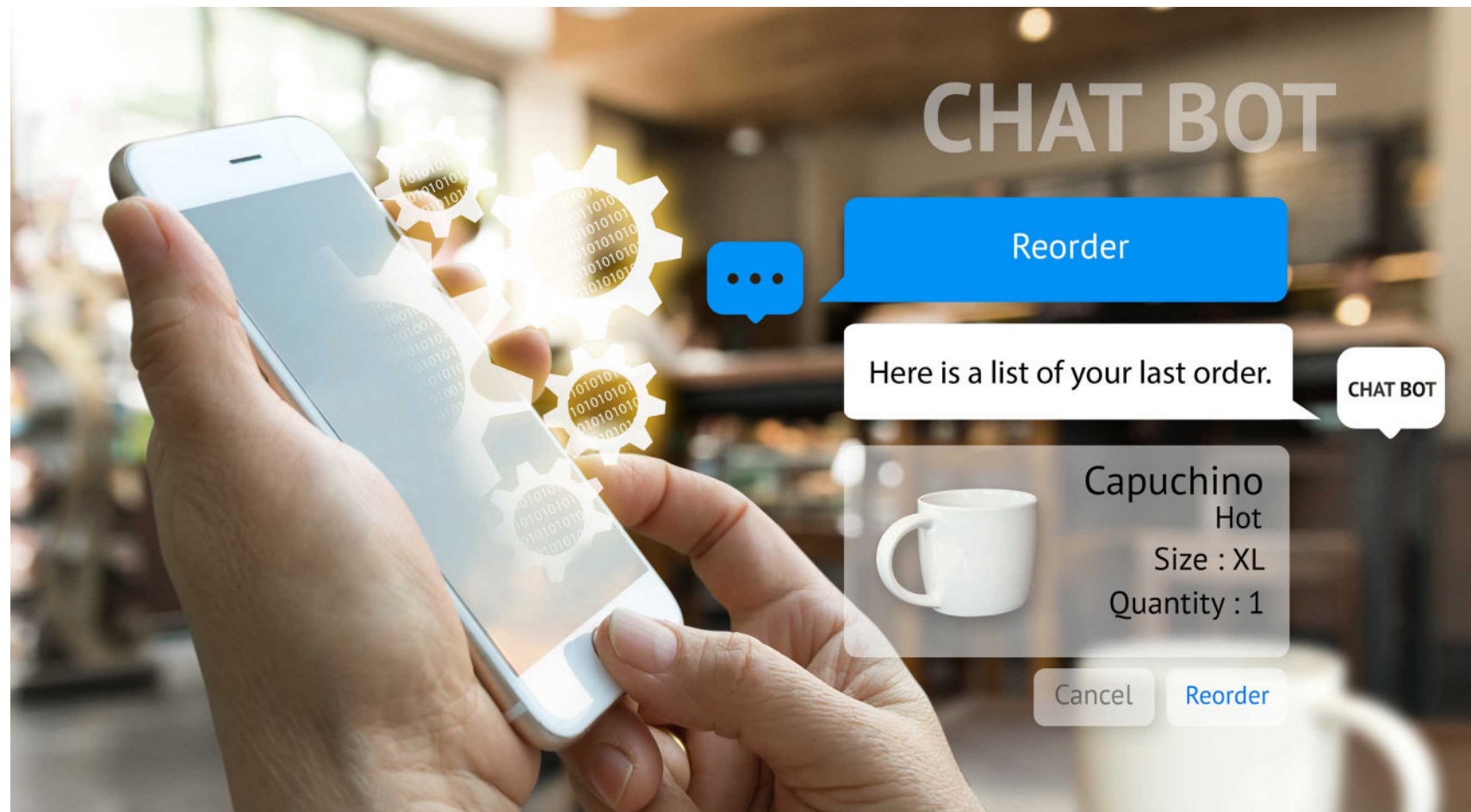
The *ideal* customer experience state is one in which companies begin delivering functionality enabled by technology few of us even knew existed.
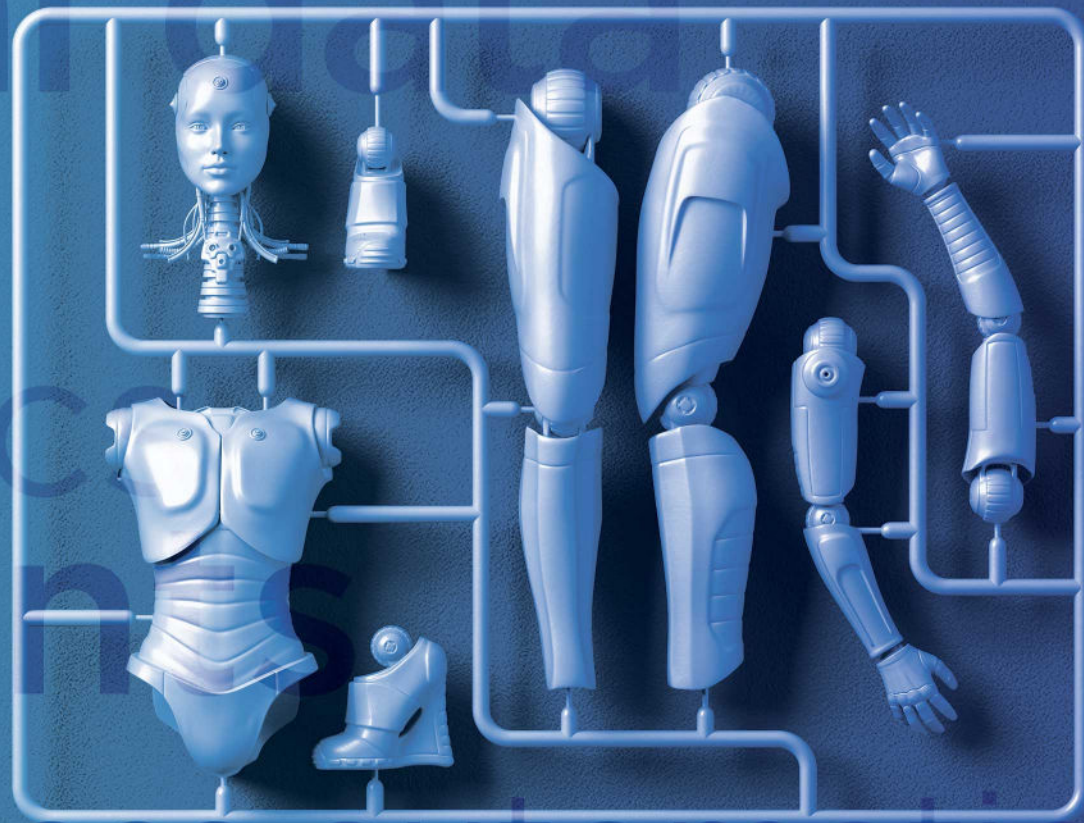
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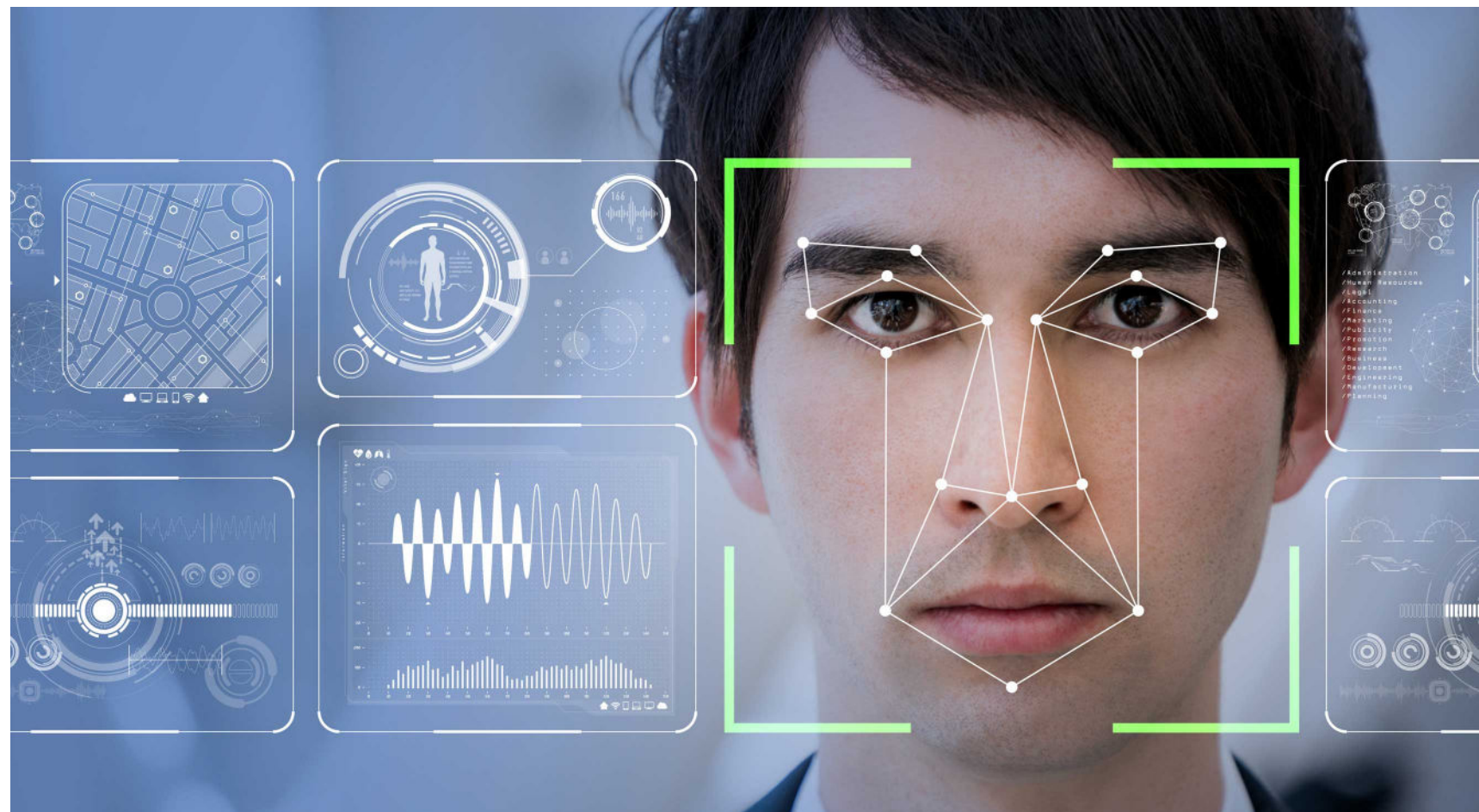
natural language processing

behavioral data

conversational
computing

text analytics

virtual agents

robotic process automation

machine learning

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HOW AI IS SHAPING FINANCIAL SERVICES

INTELLIGENT EXPERIENCE:
Using AI to deliver personalized recommendations to clients that are relevant, suitable, timely and actionable.

INTELLIGENT OPERATIONS: Using AI to eradicate repetitive tasks results in an effort to reduce costs and increase employee satisfaction.

INTELLIGENT ALPHA: Using AI to amplify human intelligence and judgment by providing contextual knowledge and support.

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INDIVIDUAL AUDIENCE INTELLIGENCE

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Universal Graph ID	Behavioral Analytics	Natural Language Processing & Concept Mapping	Causal/Semantic AI Inference Engine
360 Customer View & Cognitive Intelligence	**What People Do**	**What People Say**	**Why**
Understand your customers & their related behavior	Machine learning and predictive analytics against time-stamped behavioral data	Applying trained, unsupervised models to text in real-time, or historically, to understand relationships and trends	Vast knowledge base trained to make machine-speed decisions and apply reasoning to decisions

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THE IMPORTANCE OF DATA

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Robust data partnerships underpin an unprecedented view of linked behaviors.

WEBSITES & SEARCH
95% of Digital Pop.
2MM+ Panelists

PURCHASE
MM's of Monthly
Purchases

TELEVISION
8MM+ HH's

1st PARTY DATA

SOCIAL
160MM+
Social Profiles
[US]

LOCATION
100MM Devices
20B+ Monthly
Location Events

SmartCOMM

FINANCIAL DATA FEED
Bloomberg,
Reuter, etc.

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HOW ARE FIRMS USING DATA & AI TODAY?

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DATA-DRIVEN INSIGHTS IN ACTION

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SEGMENTS

- Who are our customers? Who are our critics?
- What percentage stopped going to store after food quality issues?
- Who is the most vocal? Who is silent, but engaged?

- Where are they, and what do they look like demographically?
- How do they compare to the broader population?

INSIGHTS

- What do they feel on the issue, and how strongly?
- What content do they consume, and on what mediums?

- When and in what context is information consumed?
- What common paths do they take?
- What else are they interested in?

UNCOVERING THE INFLECTION POINT

- Are we seeing increased foot traffic?
- Are people clicking on ads?
- Has the negative chatter on social decreased? Has news coverage sentiment changed?

- Has the stock price moved?
- Are people buying franchises/opening new stores?

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SMART SEARCH | PROBLEM STATEMENT

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Improve investment research analyst **productivity** by

- Improving search capability to find information *quickly* and *more precisely* than keyword search Financial services, digital transformation and experience design

- Across *structured* and *unstructured* information sources, both private & public

- Including company analysis, industry analysis, forecasting and valuation

- Using a more *natural user interface* for better ramp up

RELATIONSHIP MANAGER

INVESTMENT RESEARCH ANALYST

DISTRIBUTION CONTENT WRITER
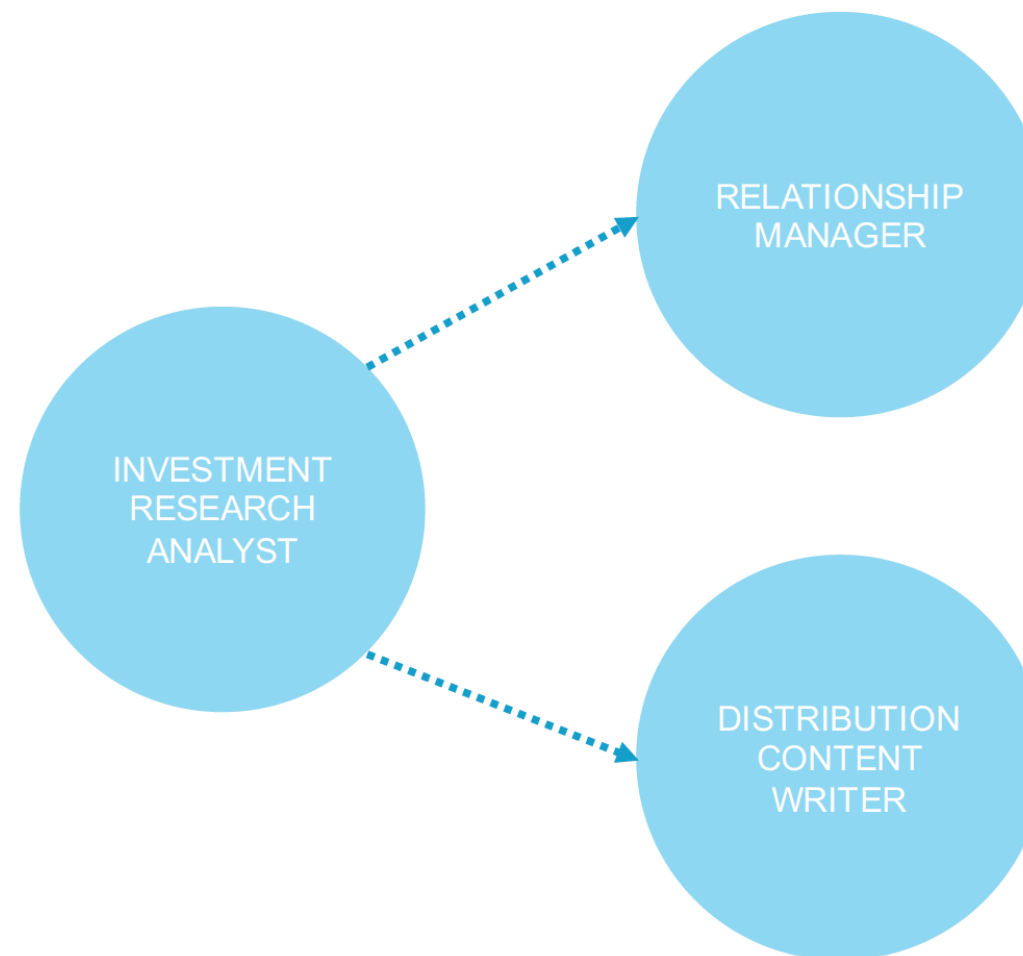
Improve customer servicing **quality** by providing relationship managers

- Improved access to equity research, credit research, economic research, commodity research

- Using a more *natural user interface* for quicker and more precise lookup

Improve content writer **productivity** by providing improved access to selected research

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SMART SEARCH | SOLUTION APPROACH
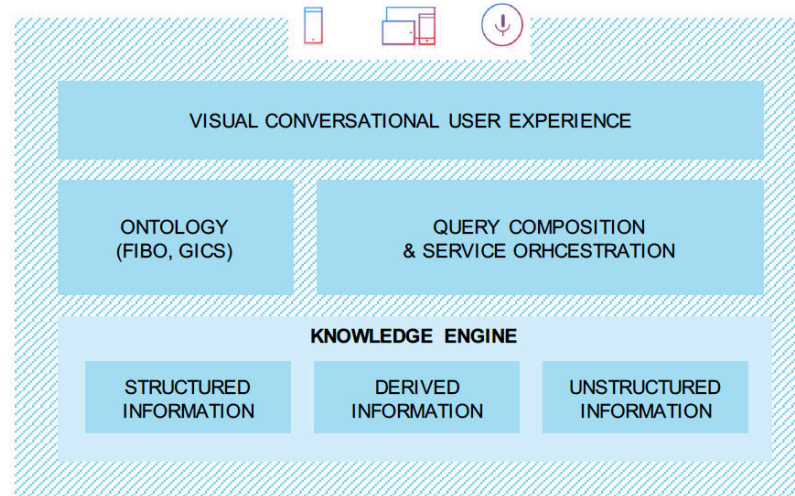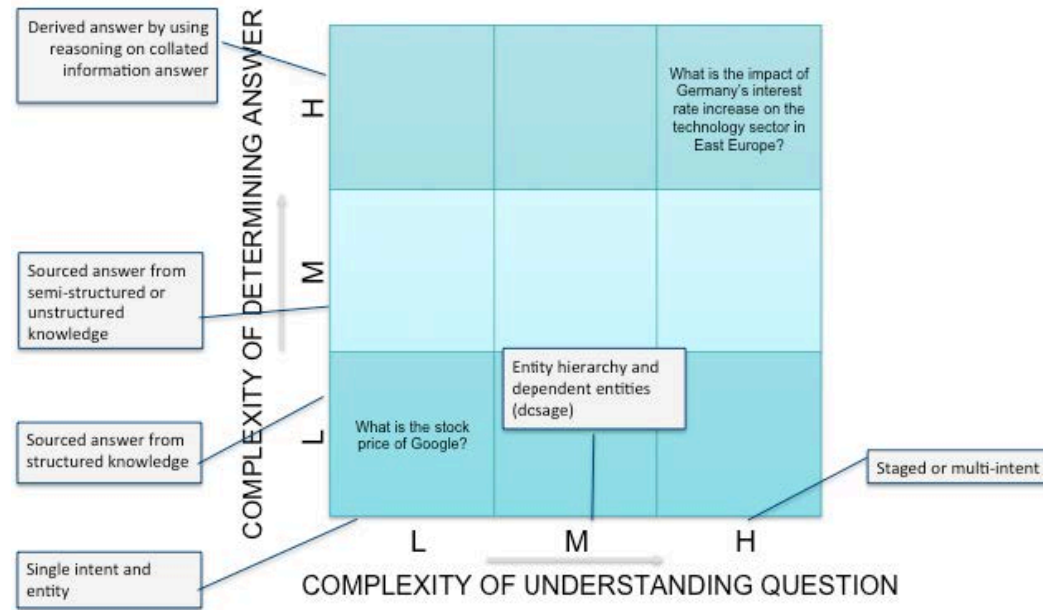
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SOLUTION

- Easy, natural language interface
- Platform to enable ontology-driven search to pinpoint information in documents
- Understand spoken or written natural language questions and provide answers within the domain
- Automated metadata harvesting

RESULTS

- Find critical information buried in filings, news, research and in-house content
- Improve research analyst productivity by 27%
- Improve relationship manager satisfaction and customer relationship quality

SOLUTION APPROACH

SEMANTIC ANALYSIS

ENTITY EXTRATION

INTENT RESOLUTION

TOPIC MODELING

ONTOLOGY HARVESTING

POLARITY ANALYSIS

SENTIMENT ANALYSIS

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Thank you.

Visit the Sapient Consulting table to see a demo of basic chatbot integration and find out how you can get started.

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