



Exceeding Expectations of Digital Customers with Modern Conversations

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Agenda



The new world of Customer Communications



The Digital Workplace: The source of digital customer experience



The new role of Artificial Intelligence and Machine Learning (Conversational AI)



The new conversation – engendering loyalty with CCM conversations



The Communications Platform: CCM as a customer communications hub in the enterprise

The Brave New World of Customer Communications?

71% of companies say Customer Experience is Very or Extremely Important.

IDC survey shows customer experience is the leading initiative in Digital Transformation.

How do I keep track of all these channels?!

Where should I invest?!

How do I control my brand?!

How do I know what my customers really want?



The New World of Customers



The Individual Customer

Almost every customer now uses at least one digital channel.

Their journey can now begin and end in many different ways.

Communications must be adaptive and responsive.

Every communication must be designed with the digital customer in mind, and meet their expectations for consistency.



Disconnected design = disconnected experiences.

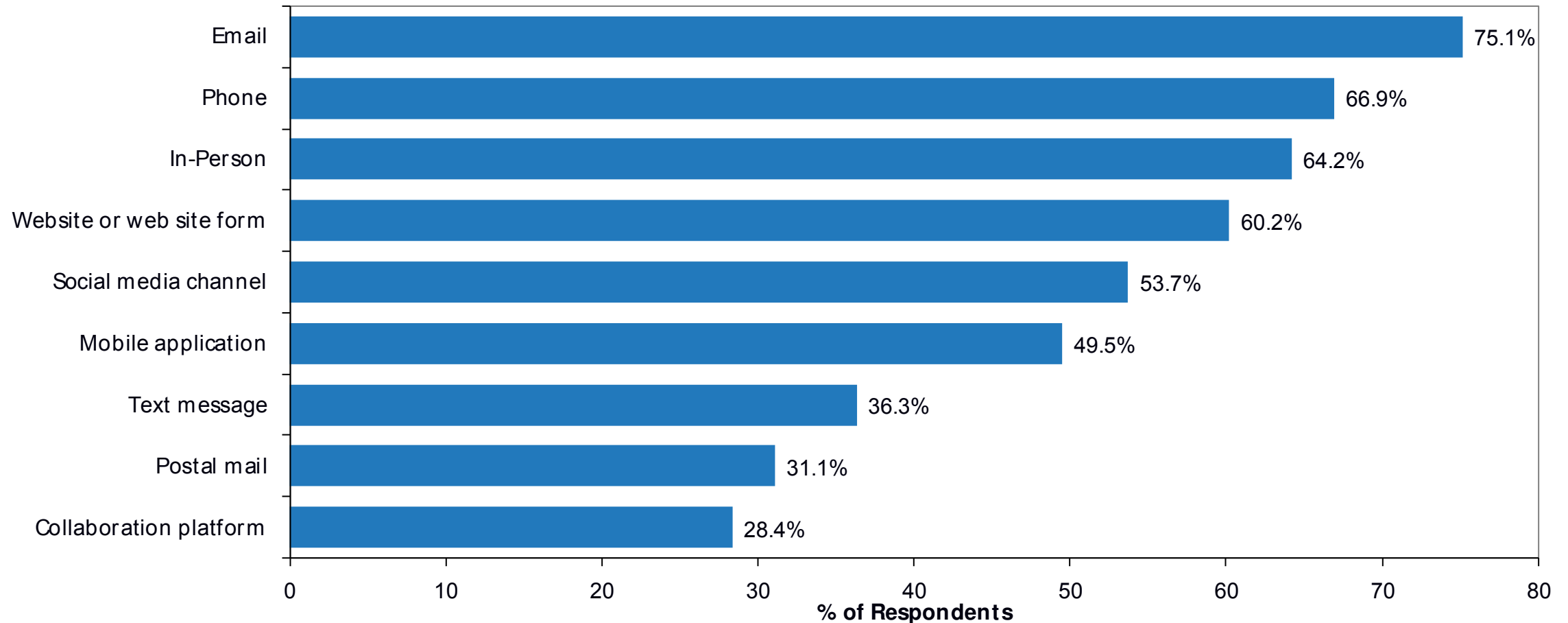
Brand consistency, message consistency and smooth experience are paramount.

Disconnected business processes = disconnected communications.

Without an integrated communications platform there is no way to provide consistency.

Customer Preference: Customers still prefer traditional channels, but digital channels are increasing in importance.

Q. What are the top 5 communication channels your customers use to reach you?



IDC FutureScape: Worldwide Customer Experience

Digital Transformation

Time to Mainstream

10 Trends

1. Privacy reimagined
2. Algorithm-based CX
3. Customer self-service
4. Seamless experiences
5. Cognitive customer support
6. Digital services
7. Eliminate the middleman
8. CX AR
9. Natural language processing
10. Biometric personalization

Note: The size of the bubble indicates complexity/cost to address. Source: IDC, 2017

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By 2020, 40% of Leading Brands Will Offer Their Customers Continuous Digital Customer Experiences That Span Both in Store and Out of Store

The Future is Closer Than You Think

1

Direct

A direct experience means active voice, coherent in-bound and out-bound communications across the enterprise. A conversation.

2

Engaging

An engaging experience means access to files, data, video, audio, systems of record and decision-making support. Automation and human augmentation.

3

Continuous

A continuous experience means real-time, always-on, coordinated and managed omni-channel capabilities with intelligence and augmented awareness for optimization.

Digital Workplace: The Source of Customer Experience

It is not possible to provide enhanced digital experiences to customers with dated, legacy, disconnected processes and work environments.

The modern workplace must reflect the digital realities of the customer experience.

Business transformation is a requirement for advanced customer experience success.

Content in Motion Drives Conversation

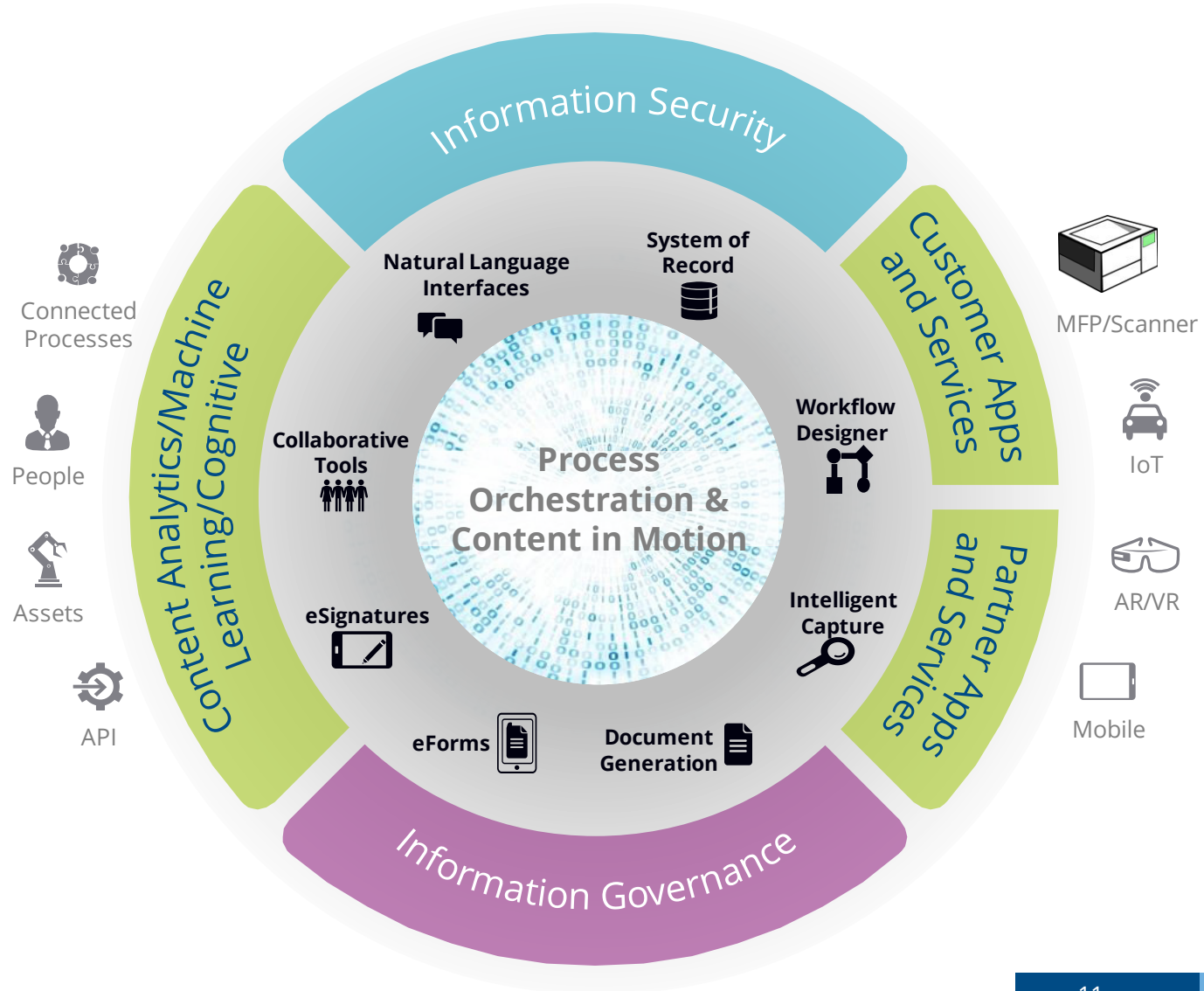
Many Customers, Many Conversations

- Impacts multiple systems
- Must Streamline exception handling (everything is an exception)
- Decisions must be intelligent
- Voices must be human
- Mistakes must be minimized but response must not be delayed
- Flexibility, automation, integration and augmentation are key

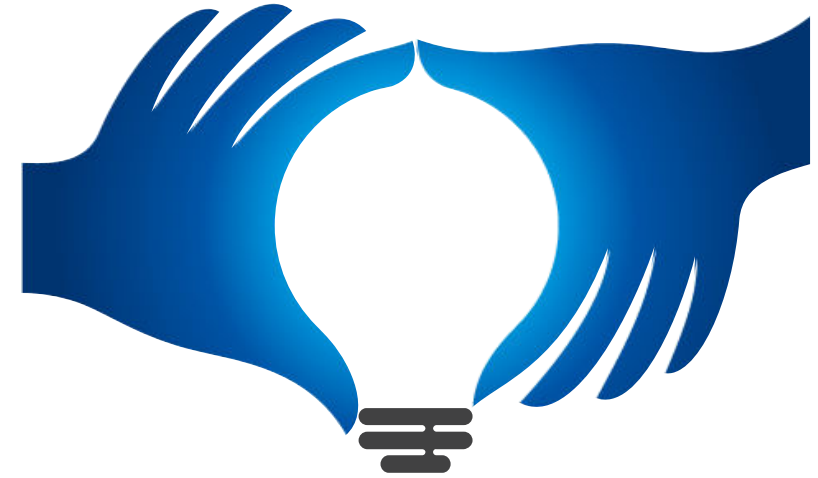


The New Workplace is an Ecosystem

- Process orchestration and content in motion are the heart of customer experience
- Micro-service interfaces, rapid time-to-value and flexibility to customize drive both adoption and success
- Robust security, governance and analytics must support but not hinder



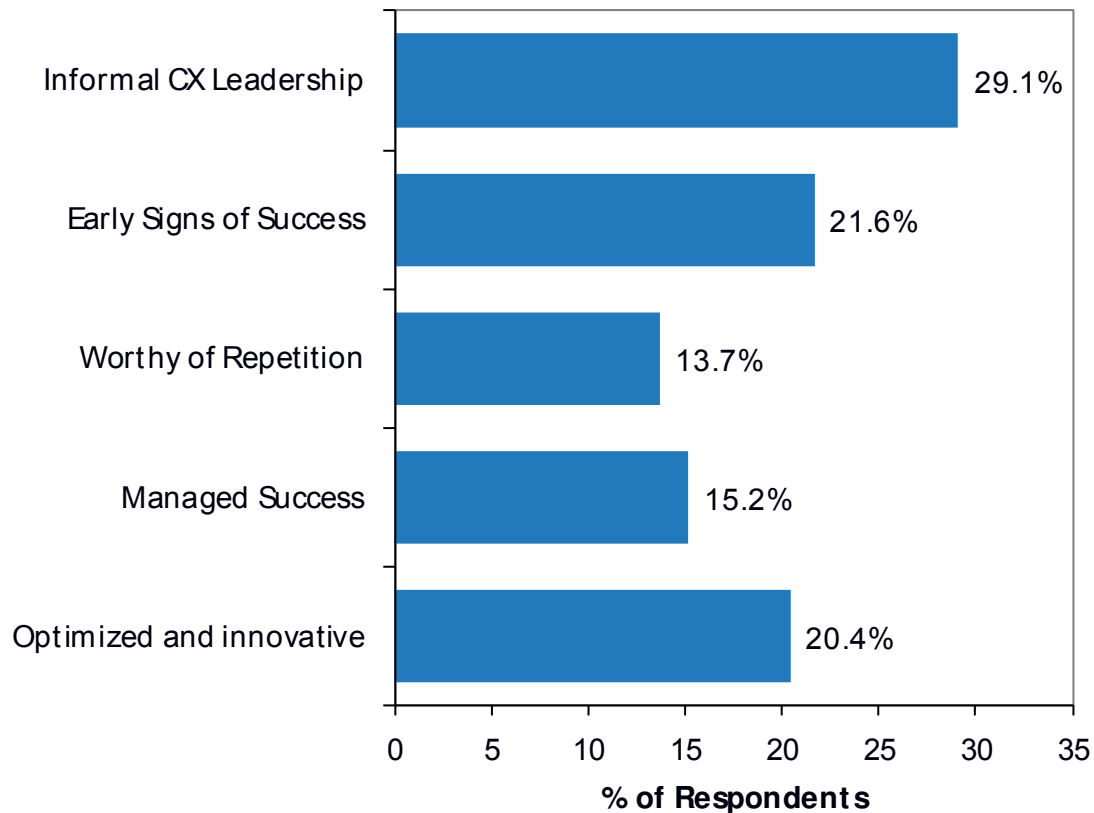
Requirements



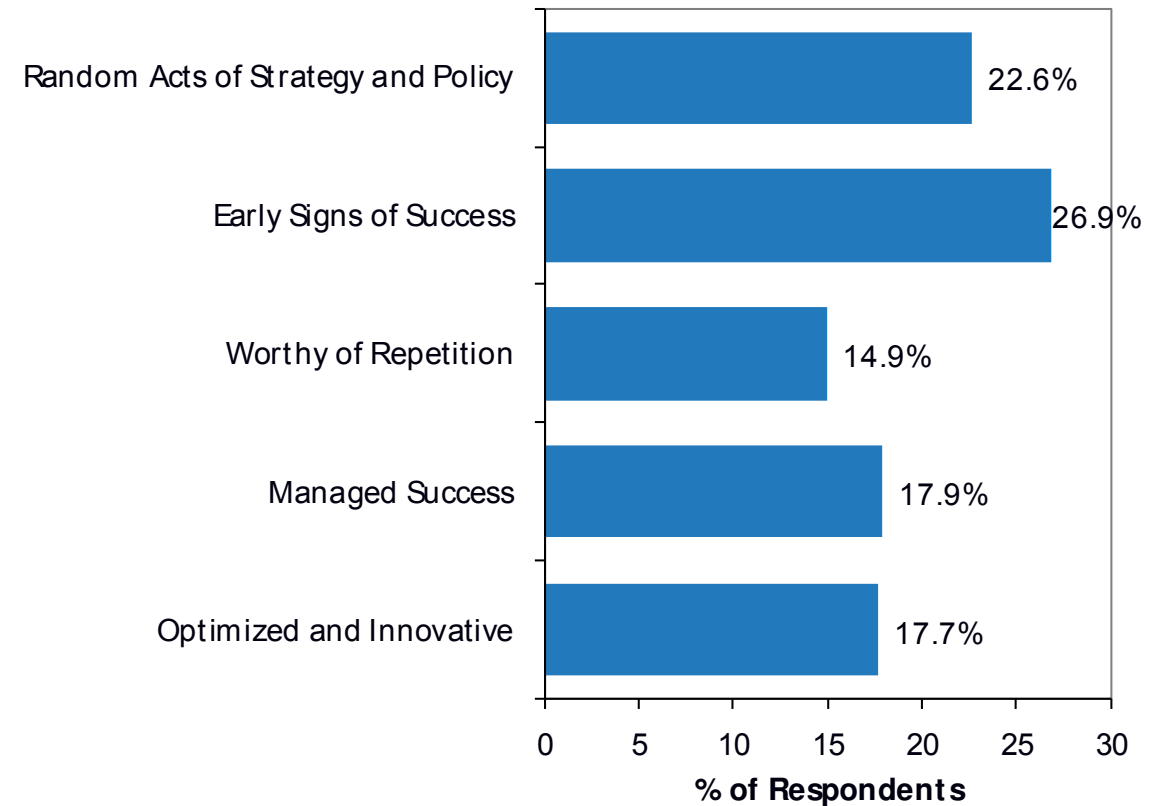
- Integrate input from many sources
 - Internal systems of record
 - External data markets
 - Customers and Community
- Rapidly iterate communication design and development
- Streamline and automate the business processes that support customer service and communications
 - Automate route and approval
 - Simplify and rationalize templates
 - Evolve a collaborative, end-to-end workflow for communications

Competitive Advantage: Where Are Your Peers?

CX Leadership Structure



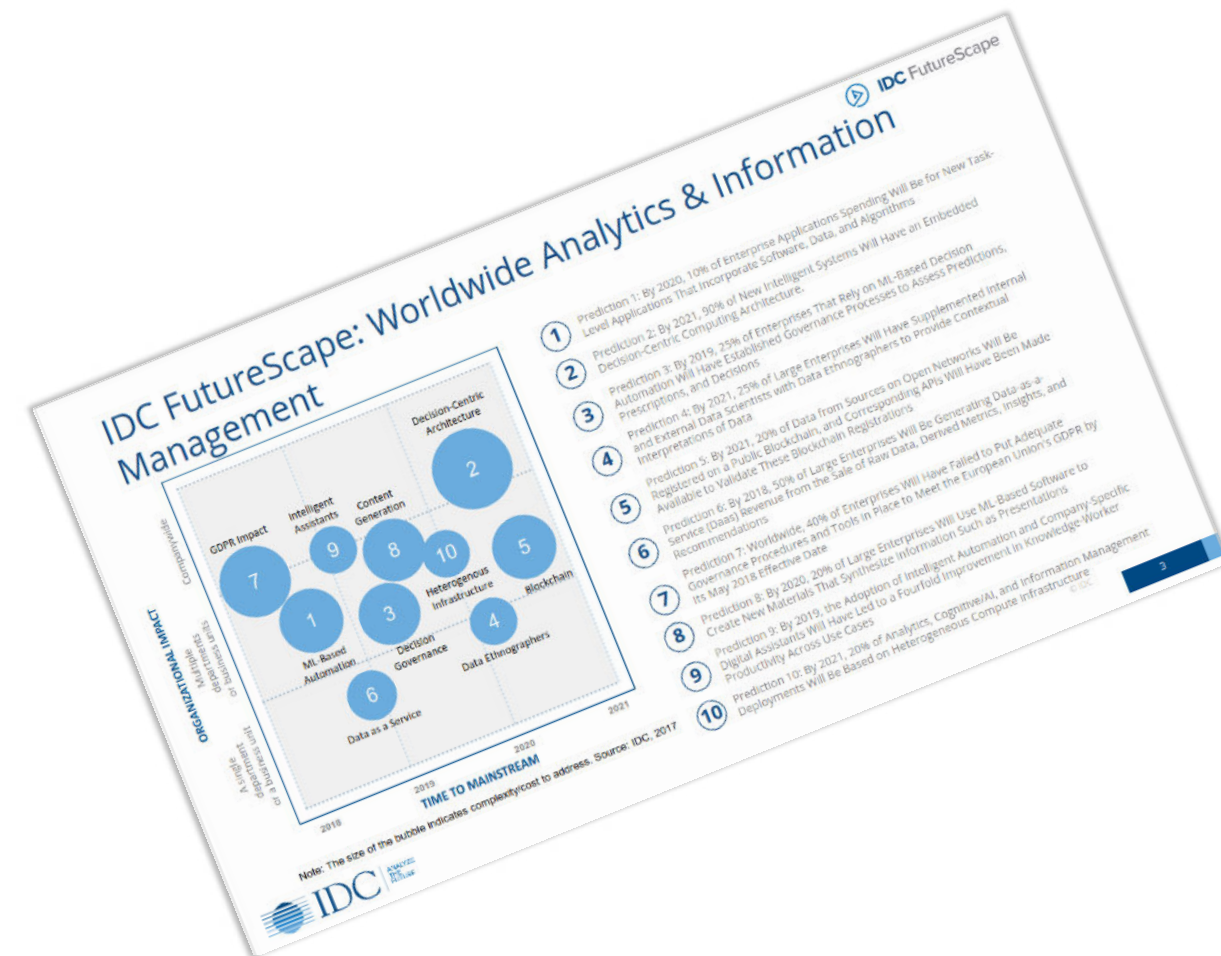
CX Strategy



CCM, AI and Analytics are Deeply Intertwined



Predictions – Where is this going?



By 2019, the adoption of intelligent automation and company-specific digital assistants will have led to a fourfold improvement in knowledge worker productivity across use cases

(Process Automation)

By 2020, 20% of large enterprises will use machine-learning-based software to create new materials, including reports, correspondence and visual communications

(Intelligent Documents)

By 2021, 90% of new intelligent systems will have an embedded decision architecture that automatically detects and evaluates conditions and makes decisions about how to respond

(Human Augmentation)

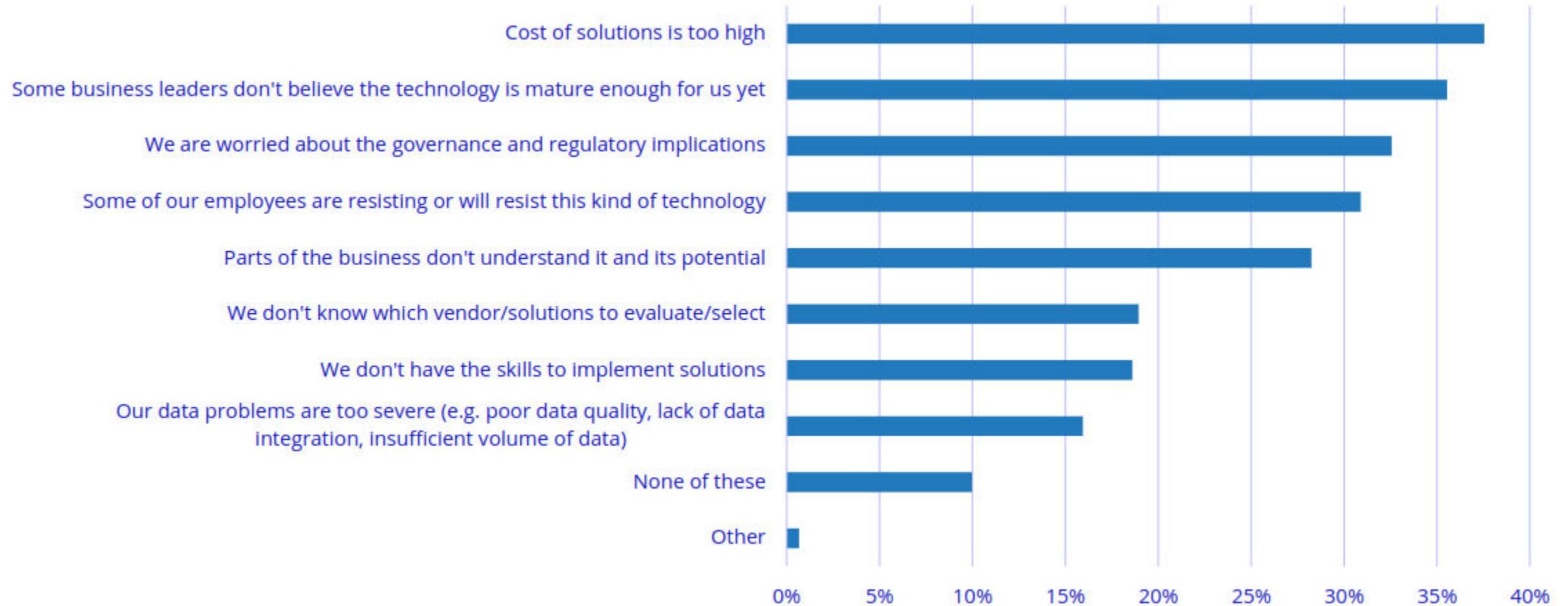
The market for Cognitive/AI is growing

Cognitive/AI Software Platforms	
General Purpose Cognitive/AI Software Platform	Chatbot/Conversational AI Platforms
     	  
    	  
     	  
     	   
    	   
    	  
    	  
    	   
    	  
	   

Source: IDC, 3Q17

For areas that IDC covers, the top 3-5 market share leaders are represented. For areas that IDC does not cover, vendor selection is up to analyst discretion.

What are the key barriers to deployment?



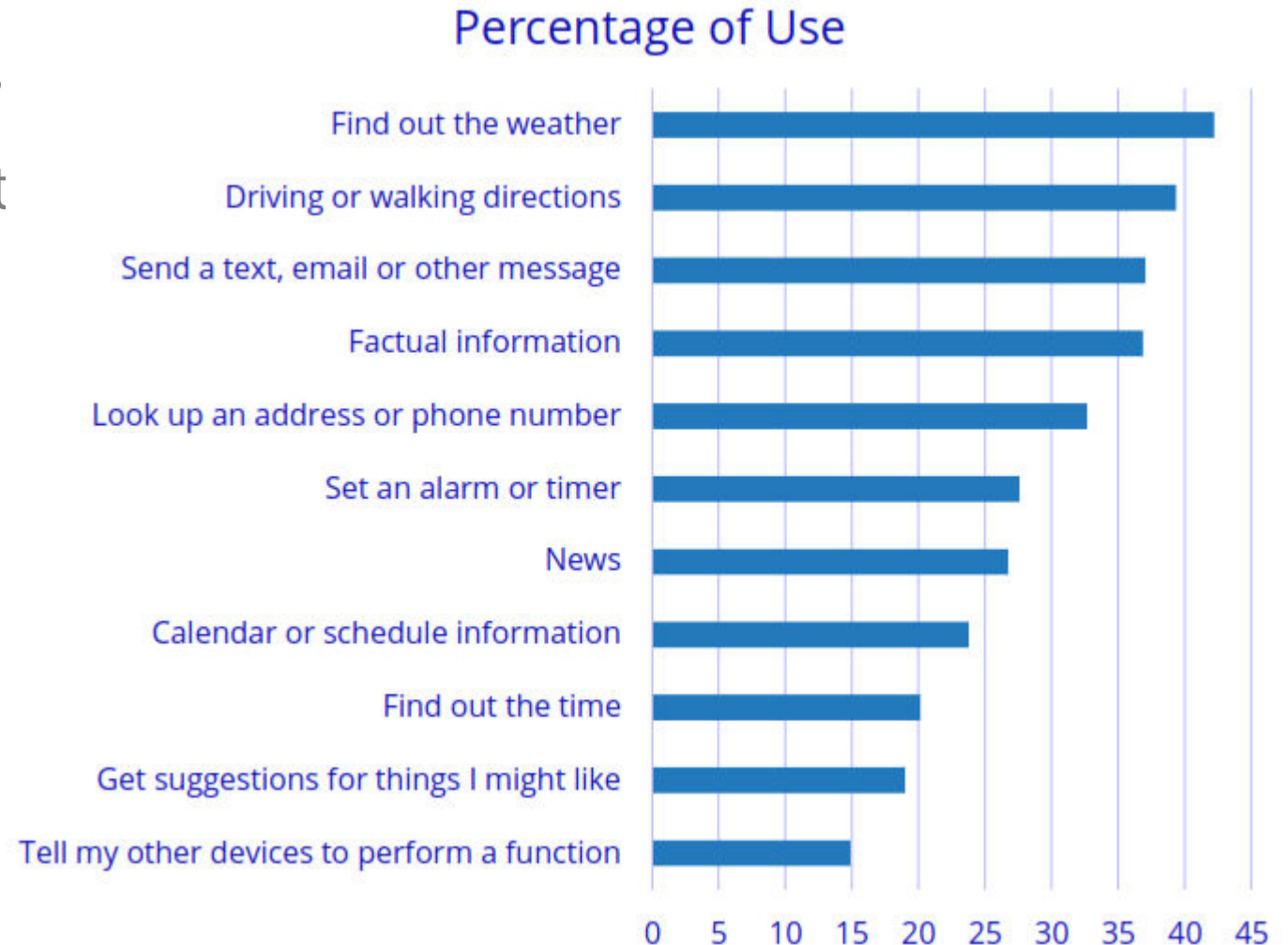
AI is hard



- Unrealistic expectations
- Difficult to use and incomplete AI platforms
- Sufficient quantities and types of data
- Lack of skills and expertise
- Robust testing and QA tools

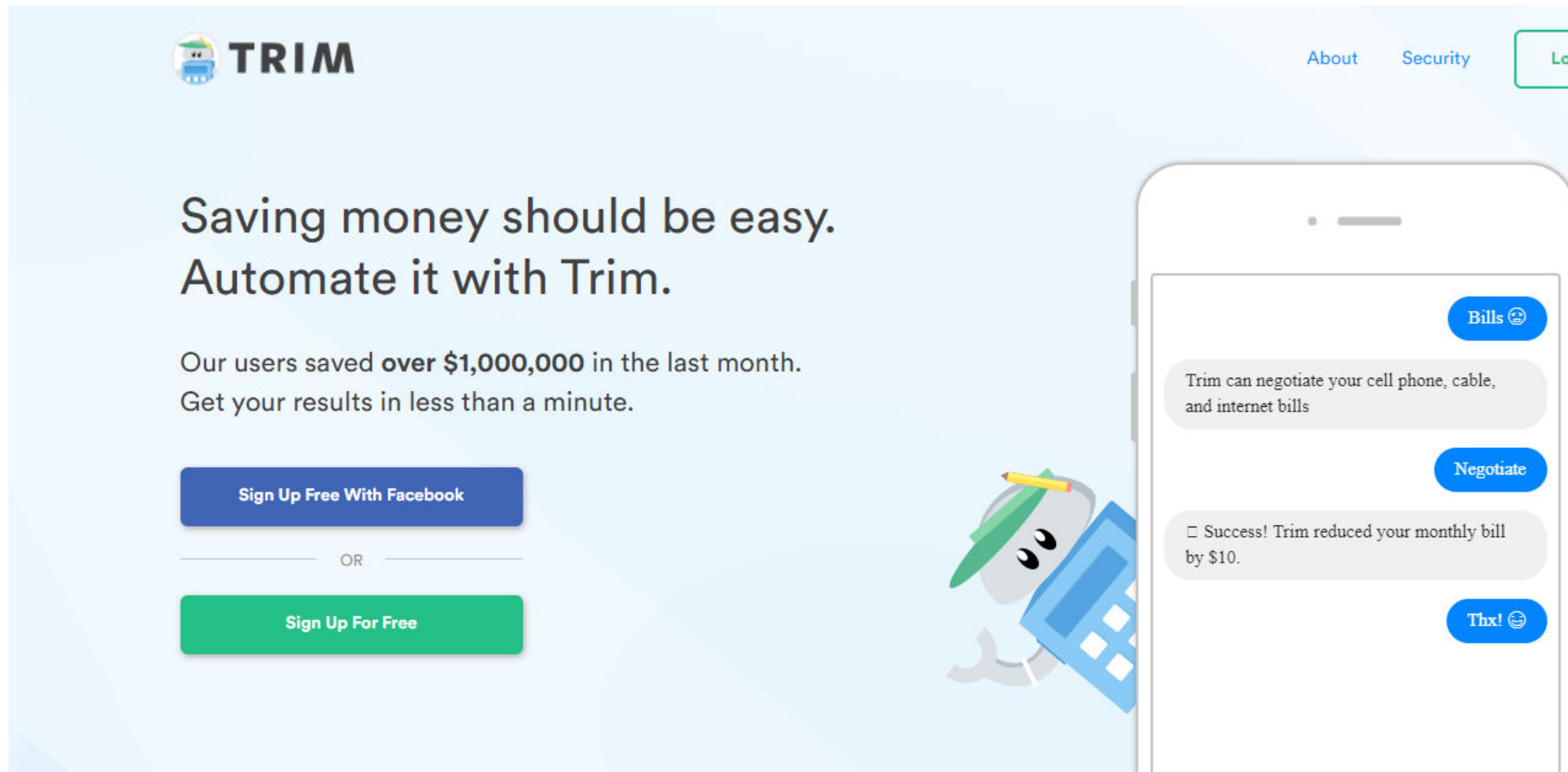
But consumers are using it

- By 2020, 50% of customers will have experienced an AI-based customer support interaction
- More than half of the people who use Smart Assistants cited at least three applications
- More than 70% of people who used an SA in the previous day said they used at least three applications



Use it, or have it used against you

TRIM (asktrim.com) – consumer service bot that negotiates



What Should You Do?

1

Consider

Workforce demographic changes and increasing expectations for voice-first interactions with systems.

2

Evaluate

Broad information handling capabilities and techniques such as text analytics, auto-categorization, auto-tagging and auto-taxonomy generation.

3

Invest

Technical capabilities such as bot management, data/content life-cycle management and governance solutions to handle voice content.

What Should You Do?

4

Enlist & Prioritize

Enlist knowledge workers in the design of applications and tools. Prioritize those features and functions which alleviate the most repetitive and time-consuming tasks.

5

Start & Focus

Start with a single use case and focus first on work products used by senior management. Iterate and expand to additional groups and functional areas.

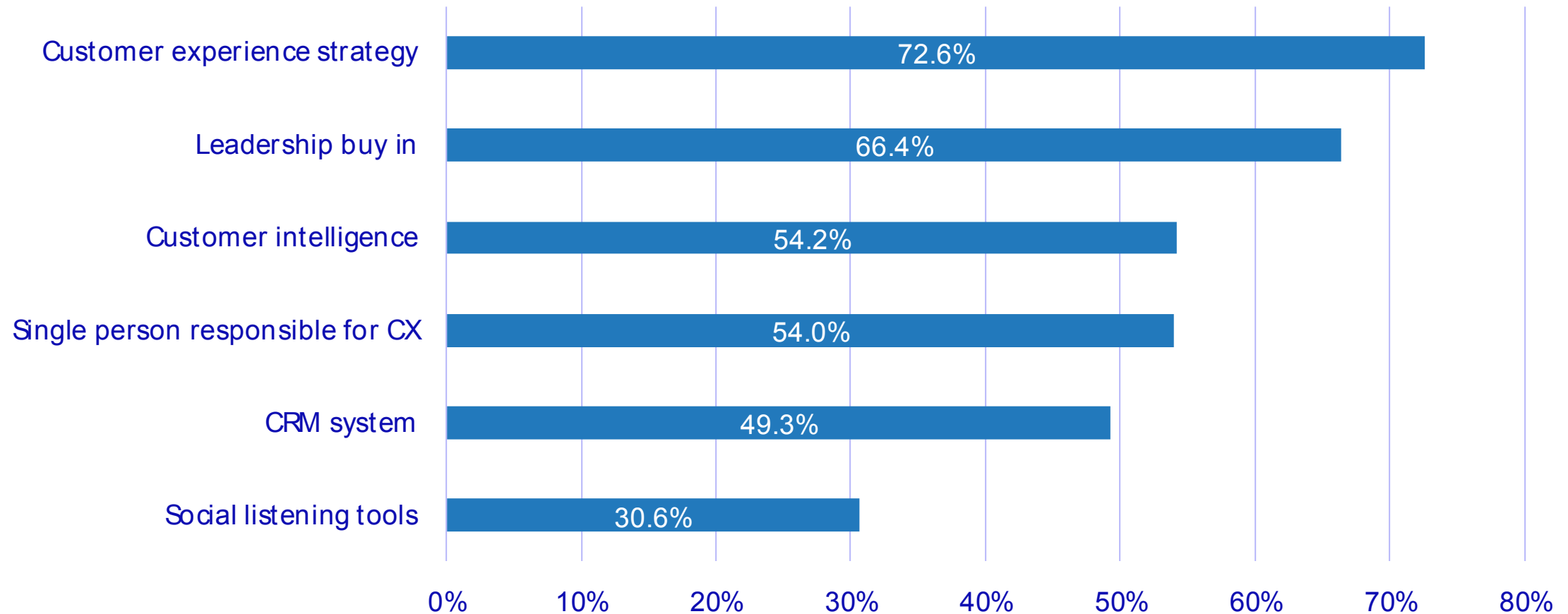
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Ensure Success

Select the right project: low decision risk, narrow datasets, minimal “noise” in the data. Gain cooperation within your enterprise and senior management (See #5).

Analytics provides customer intelligence

What is most important to CX?



Unreasonable Expectations



- Customers do not appreciate knowledge gaps
- Everyone in customer service must be an expert
- Everyone touching the customer must know (or have immediate access to) everything

What Should You Do?

1

Bridge the gaps

Bridge the silos between departments, functions and business units.

2

Integrate

Centralize content through integration and federation.

3

Analyze

Business analytics for customer analysis, text and content analytics for usefulness and clarity, situational and sentiment analytics appropriateness of response.

Engendering Loyalty with conversations



Customer Experience is not a Gordian Knot

Identification

Initial data gathering and determination of who the customer is and the circumstances that brought them into contact with enterprise

Authentication of who the customer is within the context of this interaction

Personalization

Process to understand what the customer wants and needs along with the customers' general and specific expectations through direct and indirect data and information gathering

Alignment of the customer wants/needs, both desired and sufficient, with the products and services the enterprise can provide

Execution

Ability of the enterprise to successfully execute on the public brand promise to the customer by utilizing the technology infrastructure, the businesses processes, and related staff.

Ability of the enterprise to orchestrate all of these elements to meet or exceeds the desired outcome expected by the customer.

Customer Monitoring, Analysis, and Data Management

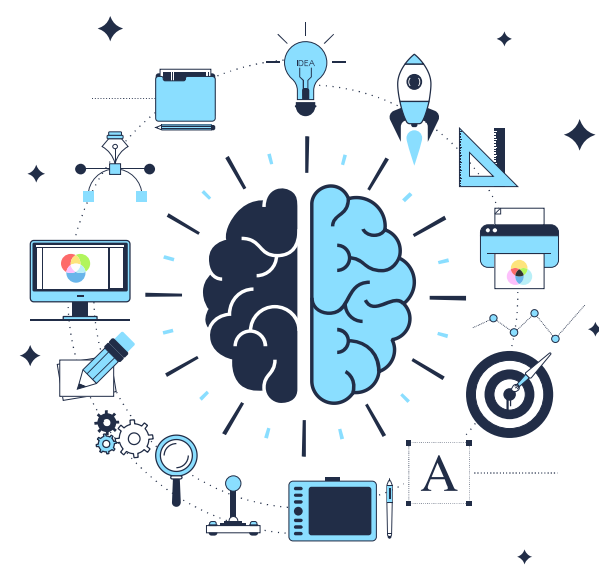
Customer interactions form extended conversations



- Customers intuitively maintain context.
 - Knowledge workers engaging the customer must be able to quickly and accurately restore context.
- Customers extend the conversation to family, friends and public social networks without hesitation
 - Knowledge workers and their support systems must maintain awareness of these extended public conversations
- Customers happily self-educate and self-serve, but when something goes wrong do not expect patience
 - The scale and scope of the problem, as well as its potential impact on the business must be rapidly assessed, preferably with automated/augmented technology

The stakes are high

- People who connect with brands actually believe they are connecting with the people behind the brand
 - It is no longer enough to have messages that meet brand specifications. The response itself must uphold the standard the brand sets
- Properly designed and implemented technology can augment and support conversations that meet brand standards
 - Systems can support and supplement the worker, providing confidence
- The integration of people, process and technology is key
 - Technology forms a foundation, process makes it cohesive and people make it human



Platform Thinking: The Foundation for Customer Experience

**If you change the way you
look at things, the things you
look at change.**

Wayne Dyer



“Many large corporations today that are moving to platforms are realizing that they are no longer in the business of selling products or services, they are in the business of creating a connected ecosystem of offerings, all of which work together to solve the user’s pain point.”

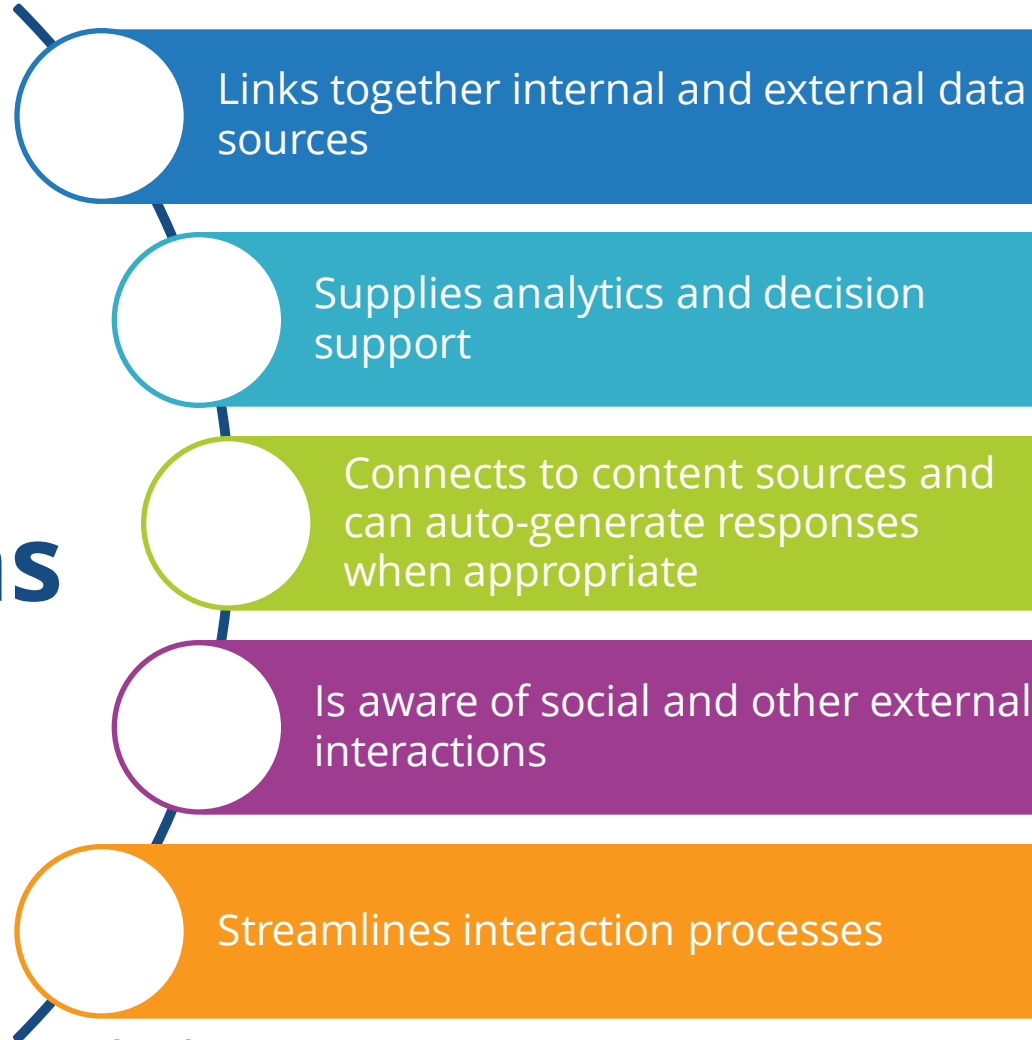
Sangeet Paul Choudary,
Author of *Platform Scale*, in 2015 interview

Traditional CCM must evolve

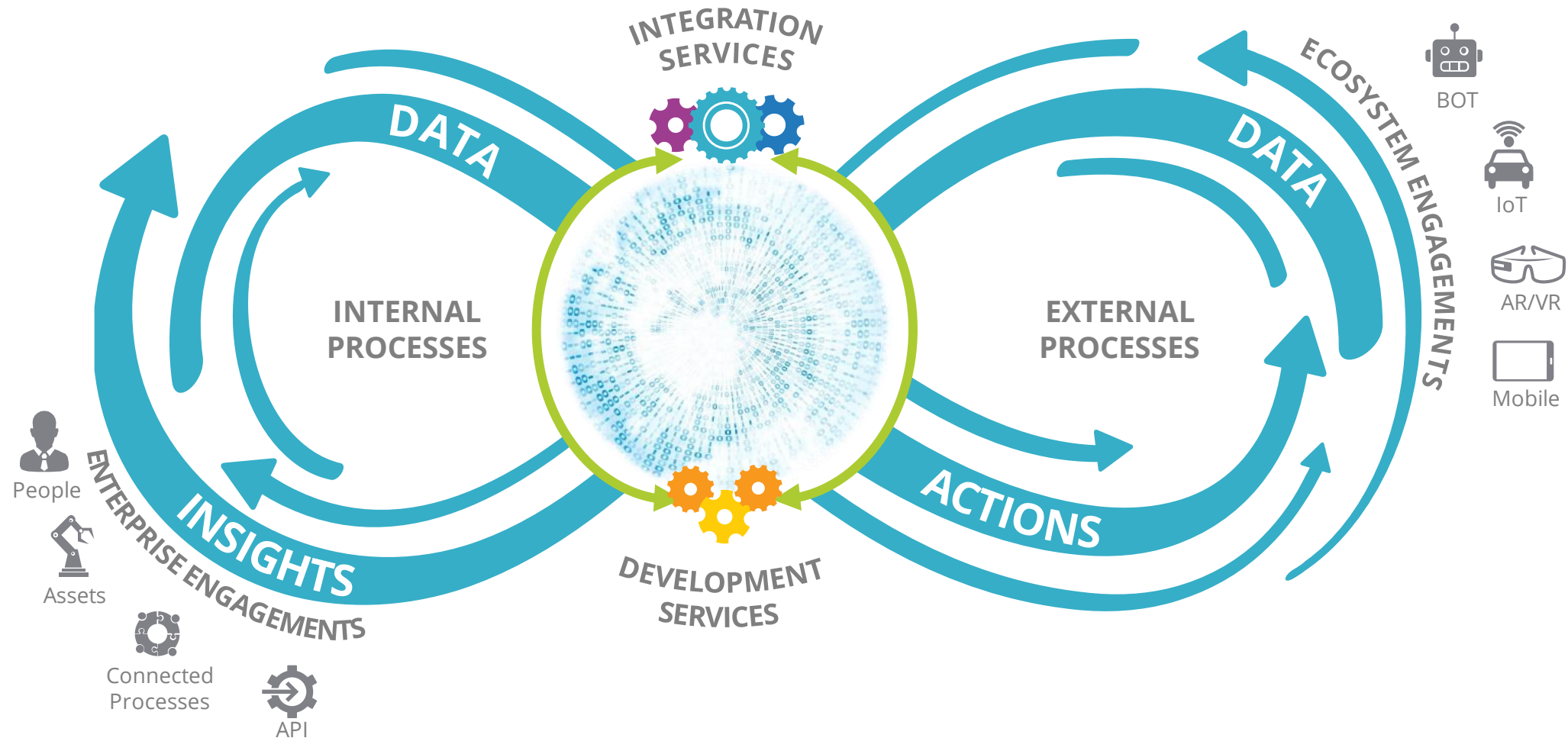
- Necessary but not sufficient
 - Branded messages
 - Templated response
 - Batch, interactive, on-demand
- Operating in its own silo, isolated from too much of the organization and disconnected from too many data sources
- Focused on outbound
- Constrained by preconceived notions

imagine...

... the Customer Communications platform



Part of the broader New Digital Platform



Final Words...

- Communications is the core of Customer Experience.
- Whether self-educating, self-serving or seeking help, customers now expect human consideration and the right response, at the right time, in the right way.
- Conversation is the real communication. We've never been well-served by the old way, we just couldn't manage any better.
- Today we can.

For More Information



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