

# DELIVERING CUSTOMER EXPERIENCE THAT MATTERS

Combining Human Intelligence with Artificial Intelligence  
to Delight Your Customers and Gain Market Share

**Matt Rocco & Jim Iyooob**



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Intelligence with Artificial  
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# Matt Rocco



Matt Rocco is the President / CEO for Etech Global Services.

Matt is a 36-year veteran of the call center / BPO industry. He has held key leadership positions within Dun & Bradstreet, The Berry Company (a subsidiary of Bell South), Etech, Inc. and Etech Global Services. Matt has spoken at many industry events and has been featured in articles in numerous periodicals including CIO Review, Call Center Magazine, Call Center Times, Connections Magazines and others.

Matt started as a telephone rep for D&B in 1984 and now serves as President / CEO of Etech Global Services. In the past 36 years, he has spent time in every facet of call center operations and outsourcing processes.

Since 2003, he has been the President / CEO of Etech's operating companies, a multi-national outsourcing organization with over 3,000 employees that provides world class solutions to Fortune 500 companies from its locations in the US, India and Jamaica. Under Matt's leadership, Etech has received numerous industry and community awards including: Top 20 Most Promising Quality Monitoring Solutions Provider – CIO Review, Professional Association of Customer Engagement (PACE) – Technovation Award, PACE – Corporate Citizen Award (4 times), GEISA – Best Call Center / BPO Award, Top 50

Minority Owned Businesses – Diversity.com, US Chamber of Commerce – Corporate Citizenship Award and many others.

Matt has also co-authored two books with his business partner and life-long friend, Jim Iyob.

1. Quality Monitoring in a Contact Center: Making Sure Your Contact Center Works for Your Business
2. The Future of Contact Centers: Leveraging People, Processes & Artificial Intelligence.

Matt is married to his college sweetheart, April. They have raised five children - Nick, Matthew, Jermaine, Jamaal and Lexie

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# Jim Iyooob



Jim is the Chief Customer Officer for Etech Global Services. Jim has responsibility for Etech's strategy, marketing, business development, program implementation and product development across all of Etech's existing lines of business – Etech, Etech Insights, Etech Technology Solutions (ETS), and Etech Social Media Solutions. He is passionate, driven, and an energetic business leader with a strong desire to remain ahead of the curve in outsourcing solutions and service delivery.

Jim has 30 years of contact center outsourcing experience in inbound, outbound, chat operations, and social media management spanning across the globe; domestic, nearshore, and offshore. His expertise includes operational performance management, e-commerce sales and service with an impeccable track record of innovation and advanced business intelligence. One of his strongest suits is being able to assist customers in launching and developing their live chat operations into a world-class customer experience solution.

Jim has an exceptional understanding of the customers' products, their requirements & processes, and a complete analysis in order to provide a tailored solution. This has helped him develop, implement, and retain some of the

most successful, award winning outsourcing solutions that deliver consistent ROI. Due to his level of expertise, Jim has been featured in numerous publications including CIO Review, Contact Center Pipeline, Connections Magazine, and was also listed as one of the ‘Top 20 Influential People to Follow’ on Twitter by “Iwantitnow”.

The gained experience over the past 30 years has enabled him to be a subject matter expert for call center solutions.

Jim has also co-authored two books with his business partner and life-long friend, Matt Rocco.

1. Quality Monitoring in a Contact Center: Making Sure Your Contact Center Works for Your Business
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Jim is married to his darling wife, Kelci. They have raised three children – Michael, Brianna, and Kylee

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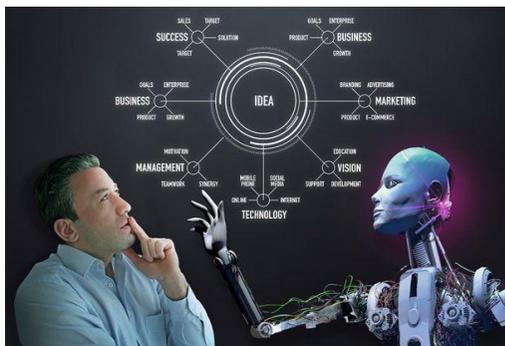
# 1. Introduction

## Combining Artificial Intelligence with Human Intelligence

**BREAKING NEWS:** It's the year 2045. The robots are rioting again. They're complaining that the humans are not effective at work. They are now fighting for what they call the "Robot Alliance Right." Whatever that means I don't even know...Anyway, that was a bad joke.

"Over the next few years, technology will rapidly advance existing capabilities to a level that is unrecognizable today." This extended capability will surely make the future several years from now a mixture of excitement and weirdness.

With advancement in Artificial Intelligence (AI), humans will surely not compete among themselves solely but will also compete with robots. This is when the Darwinian theory of "survival of the fittest" shall be made more evident. Whoever stays competitive shall stay relevant.



## 2. Customer Service — How it all began?

Before the age of mass production, the interaction between businesses and customer was mostly one on one and had a personal touch. Customer service was more about relationship; and the number of customers were limited. With the industrial revolution, businesses were now able to do mass production and cater to a larger number of customers.

The growth of customer base and competition created a need that ensured customer satisfaction, and that their questions were being answered appropriately. This led to the creation of customer service channels through various mediums, and it became the talk of the town. Customer service required immense efforts and personal interactions between company representatives and patrons. Creating relationships and spending time with customers, ideally in person or perhaps on the phone, were the chief cornerstones to success. The politeness of personnel may well have been the single greatest benchmark used to measure that success.

As technology advanced, various forms of customer service increased to in-person interactions, phone calls, chat, email and other mediums. But at the end of the day, there was one single goal – Ensure customer satisfaction by performing certain task or transaction for the customer.

That was yesterday though. As times changed, the customers also evolved. The customers of the 90s decade were satisfied if someone simply listened to them, but for today's customer, that is not enough.

# 3. Customer Experience—What Is It?

Today, the path to success lies instead in the customer experience. Certainly, listening to the customer, and providing basic customer service is an integral part of an overall customer experience but a customer evaluates a brand or business on many other criteria.

While today's consumer can appreciate a polite interaction, they seek far more than that. They need — even demand— help and a resolution to their questions or problems. And that help must be efficient — more so how and when they want or need it, not how or when you decide you will offer it.

What happens if a customer does not get what they want when they want it? How disappointing is this for a company? A whopping 96% of consumers will not even bother complaining about a poor experience. Instead, they will just leave and go elsewhere. The Right Now Customer Experience Impact Report indicates that 89% of consumers have done just this.

In *Leading on the Edge of Chaos*, Emmet Murphy and Mark Murphy show how improving customer retention by even two percent is equivalent to decreasing your costs by 10%. Forbes adds that 86% of consumers will actually pay

more for a product or service if a better customer experience is to be had. Sadly, only one percent of consumers feel that vendors consistently meet their expectations.

So, how important is customer experience to your business? Consider these three examples of how great customer experiences have influenced the following businesses:

- One Starbucks barista's commitment to excellent customer experience led him far beyond his typical daily service. Instead of being satisfied to bond with customers by asking their name and writing it (sometimes incorrectly) on the cup, this employee went above and beyond good customer service. When he noticed that one of his regular customers was deaf, he took the time to learn ASL so that the customer could have the same experience as his hearing customers. The Starbucks employee probably anticipated the happiness this would bring to his deaf patron but could not have guessed the positive press that Starbucks benefitted from – and all because he took the time to go the extra mile for one of his regular customers.
- A small car repair shop in Ohio sent a handwritten thank you note to a customer for trusting their work on the customer's vehicle. The customer was so impressed that the note

was shared around the internet. The note (a quick gesture of customer appreciation) went viral on the internet eliciting positive responses from all around the world. Not only did that mechanic earn a loyal customer by writing that note, he also gained a loyal following of individuals who vowed that they would head straight there the next time they needed to have their car serviced.

- One of the top music apps today, Spotify, has realized that adding a personal touch to their well-known playlist service helps them to retain customers. These happy customers then spread the word about just how delighted they are with the company in general. One such customer sent an email to Spotify with positive feedback for the company. As a way to thank her, someone at Spotify made a custom music playlist for her. Each song on the playlist turned out to be part of a secret message back to the customer, thanking her for taking time to help improve the company. This was certainly a customer service win for Spotify and their advertising department!

Now take a look at some not-so-great customer service interactions and the negative impact they may have had on each company:

- Anyone who watches the news on television, reads a newspaper or surfs the internet for current news is

bound to remember the infamous lack of customer service on the United Airlines flight 3411 bound for Chicago in 2017. Months after a passenger was dragged from the overbooked flight, people everywhere remember only that United Airlines treated their passenger as if he was a criminal. A viral hashtag on Twitter that encouraged customers to boycott the airlines seemed to be effective, as just one week following the incident shares in United Airlines stock had dropped from \$70.88 per share to \$67.75 per share.

- 143 Americans had their personal data exposed when Equifax was unable to prevent a massive data breach. Sadly, the information in this breach went far beyond the typical name, date of birth and social security number. Adding to this growing frustration is the fact that many have now been alerted that their driver's licenses and passport numbers may have been compromised as well. The low level of customer service will long be remembered by customers who were told by Equifax in February of 2017 that their passport numbers were not part of the breach. In May of 2018, however, Equifax reported that information from over 3,000 passports were, indeed, exposed in the breach. The company's slow-plodding method of dealing with the loss of customer data has been frustrating to many and may expose Equifax to any number of future legal consequences down the road.

Clearly, these examples are standouts in both positive and negative customer service and experiences. For the positive examples, it is perhaps the sheer simplicity of what was involved to delight customers that may be the most amazing thing. At the end of the day, it really doesn't take much more than a realization that one's customers are human and should be treated as such. Conversely, when companies seem to forget the very human nature of its customers, the negative ramifications can last for years.

## 4. The Evolution of Customer Experience

Today's customer experience has its roots squarely in yesterday's customer service. Understanding the journey of one to the other is important as this provides valuable insight into why customers today want and need something so different. Knowing this can help you embrace the changes you need to make to better meet these needs.

Apple is one company that clearly understands this transition. It has recently been rebranding its retail locations from "Apple Store" to simply "Apple." The emphasis has shifted from overt selling to an overall experience.

### *A Brief History*

Up until 1995, traditional customer service leveraging in-person and phone interactions was the standard, even though changing marketing trends included the move from segmentation to personalization. As email became a standard form of communication during the latter half of the 1990s, it added a new channel for the delivery of the customer service experience. The emergence of web-based self-service forms of assistance quickly followed and coincided with a focus on greater customization for each consumer. By the mid-2000s, another service channel emerged in the form of live chat. The entry of mobile apps around 2008 ushered in an era in which individualization

became essential for marketers, taking the prior personalization and customization trends one step further.

### *A Common Theme*

With all of these methods of delivering customer service, one thing remained consistent — companies were still primarily in charge of communications and interactions. Then along came social media. While it is looked at solely as a customer service delivery channel that principle could still applied. However, social media truly turned things on end because it is far more than simply a way for businesses to connect with their audiences. In fact, it is a vehicle by which consumers can connect with each other.

In a flash, a consumer can share their experiences — good or bad — with countless other consumers. People can learn about brands from multiple sources before ever interacting with them directly. The balance of power and control shifted from the company to the customer and customer expectations and demands grew.

### *It's All About Relationships*

Today's customer experience can be — and should be — thought of as a relationship. Forrester explains that customer experience is how people perceive their interactions with a brand. A positive experience is one that engages them at an emotive level (makes them happy), is easy to interact with and that delivers value to them.

## 5. Customer Service Versus Customer Experience

Armed with their newfound power, consumers realized that they could ask for more than what they had once been getting — and that if they didn't get it from one company, they were free to go to another. Technological advances have now conditioned them for greater immediacy in response to their needs, and that in many ways, is in stark contrast to the old - school approach to customer service. Consumers were also putting the microscope on every interaction they had with a brand, not just on those times when they had a specific problem that required assistance. They wanted a certain experience from start to finish, not just a specific type of interaction at one point in time.

Following are some key differences between customer service and customer experience:

- ***The Approach***

By nature, customer service is completely reactionary in that an agent waits for a customer to indicate that they have a need and then the agent attempts to address that particular need. Customer experience attempts to predict needs and fill them before the customer ever enters the scene — or adapt to the customer needs as the experience unfolds. To some degree, you could say that customer experience is

about preventing problems whereas customer service is about solving them.

- ***Turn Around Time***

The overall time taken to complete a transaction or interaction is a deciding factor for today's customer. In today's world, time is one of the most precious commodities and consumers want theirs respected.

- ***Communication Channels***

Starting with face-to-face interactions, customer service relied on only a handful of channels at best. Even today, many people still consider in-person, phone or email the primary connection points for service delivery with things like live chat or maybe social media somewhere in the mix. Customer experience, as we have already noted, happens everywhere. It is in the messages broadcasted by others on social media, it is in the viewing of a search result online that may or may not trigger a consumer to click through to the website, it is in the efficiency of the online checkout process and much more. The various channels for customer experience are endless.

- ***The Journey***

Customer service measures the experience of one point in time, often a point in which a customer needed the assistance of an agent. Customer experience, in contrast, looks at every little thing that contributes to the overall experience a person has with a brand that ultimately plays into their decision

about doing or continuing to do business with that brand.

Additionally, employees identified as “customer service representatives” are no longer the only people responsible for customer satisfaction. When looking at the overall customer experience, every employee has a role. This includes everyone from those who develop marketing programs and tools to those in merchandising, sales, production and more. Satisfaction today takes into account the ease of finding what one wants, the price paid for it, how efficiently it can be obtained and the quality of the end product or service, just for starters.

The business that fails to view every employee as a deliverer of customer experience is set up to fail. Customer experience requires a paradigm shift in the minds of every employee and the realization that what they do in their jobs makes a difference to the customer — and what the customer experiences makes a difference to the company in the form of retention, leaving and what they share with others.

## 6. An Introduction to Artificial Intelligence

While understanding that today's customer experience requires a strong technology infrastructure, it is important to take a look at how artificial intelligence can empower this and be a vital driver of business success.

Though some still imagine that artificial intelligence will most certainly take over the world as seen in many movies over the years, today's artificial intelligence only aims to offer assistance that will help the human element work with more efficiency.

The basic dictionary definition of artificial intelligence tells us that it is *the power of a machine to copy human behavior*. Despite sounding futuristic, artificial intelligence is pervasive in society today. Just look at Siri, Google Assistant or Alexa for starters. All of these tools provide services or do things that a human being would have done on their own. According to Gartner, 38% of US consumers have used Virtual Assistant services on their smartphones in past year.

AI comes in many forms from static to dynamic and may have the ability to identify and model relationships such as confusion, effort or price concern within the context of a conversation or interaction. Machine learning is a dynamic form of AI that easily adapts to new information to solve problems that it is not specifically designed for.

Some deliveries of AI aim to solve a specific class of problems that requires some intervention. It is here that we must acknowledge the limitations of artificial intelligence on its own. Technology is a tool that offers great power, but at the end of the day, needs human intelligence to capitalize on that power.

Take Alexa as an example. She can do nothing until a human provides her with instructions on what is to be done. Siri can spit out any number of facts or useful information but only in response to a human query. In these realities we see that the true power of AI is found when combined with human intelligence.

## 7. Important Trends in Artificial Intelligence

Satisfying customers today takes a lot more than just delivering a good product at a good price. It requires delivering a good experience as well. One of the inherent qualities of a “good experience” is that it is delivered in the way in which the customer wants it, not the way in which the company wants to provide it. What happens when a customer doesn’t receive the experience they want? They simply go elsewhere.

This can be quite a challenge for businesses as it can be difficult to imagine all of the variety of ways in which customers want what they want. How can you effectively learn what your customers really want so that you can deliver it to them? Artificial intelligence can lead the way.

### **Say hello to the cloud contact center**

A cloud-based contact center system offers you the bandwidth and flexibility you need to provide positive experiences to customers when and how they want them. It is the only way you can deliver a true omnichannel experience that is essential to allowing people to connect with you their way.

### **Gather data from machine learning**

Machine learning is something of a cousin to artificial intelligence and an important one for you. With this technology enabled, you can benefit from the immense

amount of data your cloud contact center can capture as machine learning can use features like predictive analytics to customize the experiences people have with you towards their needs and wants. It can also expedite and simplify problem solving which contributes to efficient and effortless experiences for customers.

### **Embrace the cross - functionality of delivering positive customer experiences**

The days when employees in contact centers held 100% of the responsibility for customer service are long gone. Today, service and satisfaction are the responsibility of every single employee, including those who do not even have direct customer interactions. The more you embrace this throughout your organization, the more your customers will be wowed the way you want them to – and the way they want to be.

From leveraging technology to mining data with which to make essential business decisions to making customer experience an every - employee responsibility, you can start to see how creating positive customer experiences is an ongoing cycle, not just a one - time event. In order to improve each customer experience, it is imperative that companies learn just which AI system will be most beneficial as the shift from good customer service to great customer service becomes a must.

## 8. Five Customer Experience Benefits of Artificial Intelligence

More and more businesses today are putting artificial intelligence to work for them as they look to enhance their customer experience. Why would so many companies make this type of investment? With AI as part of your CX plan, you can:

- ***Improve information delivery to customers***

A customer request for help is quite often a request for information. AI allows you to make it easier and faster for people to find the details they need thereby reducing the load on you and making customers happier at the same time.

- ***Efficiently identify customer needs***

Mining data from your speech recognition data allows you more deeply into the world of your customers. It tells you in great detail what matters to them, what they need and why they need it. Armed with this information, you can make refinements in your process to proactively provide what people need before they ever have to ask for it.

- ***Conduct testing for maximum results***

With speech recognition software, you can also conduct testing to see which scripts or processes return the best results — aka the results that leave more customers satisfied. This is a huge benefit because you can theorize all you want about which approach people will prefer but you are far better off allowing them to tell you which one they prefer.

- ***Manage external event response***

There are times when you must respond to an increased number of questions based on an external event in your company. One such example would be a major announcement by one of your competitors. Another example would be a new law getting passed that may have significant implications for your business. A good AI deployment will not only alert you to a rise in the number of outreaches but will also identify the reason for these. Whenever you see a large number of new calls attributed to one cause, you can quickly create a response for these and even implement solutions to prevent the calls altogether.

- ***Facilitate useful product enhancements***

Customer experience does not stop once a sale is made. It actually continues as long as the customer interacts with your product or brand. If someone purchases something from you but finds it difficult to use, your call center may experience a high number of calls

## Five Customer Experience Benefits of Artificial Intelligence

requesting help with it. When you see this, you may be able to work with product teams to make valuable product enhancements that eliminate the need for callbacks.

## 9. The Customer Experience-Customer Loyalty Connection

You've probably heard the old adage that "it is cheaper to keep an existing customer than to get a new customer." Well, this is true.

Earlier, we learned that 89% of consumers have left a company after a poor experience and that a two percent improvement in customer retention equates to a 10 percent reduction in costs. We also learned that people are willing to pay a higher price for goods or services in exchange for a customer experience to their liking. These facts substantiate the essence of how customer experience fuels your bottom line.

A poor customer experience is death to customer loyalty. A positive customer experience on the other hand is a boom to loyalty and to your business. One could then say that customer loyalty is really only as good as your customer experience. What are some of the things that contributes to a poor experience and therefore to disloyalty?

- ***Repetition***

Who likes having to contact a company multiple times to get help? Who likes to be transferred to

different agents only to have them retell their story from the beginning all over again? Nobody.

- ***Channel Roulette***

If a customer initiates an interaction online, they do not want to be forced to get on the phone, on an app, check email or — even worse — go to a physical location.

- ***Robotic Service***

The use of technology is expected and can facilitate a good experience but when that technology delivers a canned one - size - fits - none response or approach, the result is anything but positive.

- ***Rigid Policies and Procedures***

Not every customer's situation is going to fit perfectly into a little box. The stringent and rigid holding onto policies that offers no benefit to the customer or the company other than to say that a policy was adhered to is a killer for customer experience.

- ***The Hassle Factor***

The ease of doing business with a company is one of the most important drivers of a positive customer experience. At some point, there may be nothing really “wrong” per se but if a customer has to work

too hard to get what they want, they will stop working.

This last point might actually be the most important of all. The customer should not be made to work. The company needs to do the work and that work should focus squarely on reducing the load on the customer. We call this "effortless customer experience." Interestingly, when companies make doing business with them easier for customers, they often make it easier on themselves as well—and less expensive.

Statistics show that a company can reduce costs by as much as 37% by reducing the effort level on the customer. One reason this may be the case is when a customer has an effortless experience, they have less need for additional assistance, thereby reducing the load and cost on the company.

# 10. How to Improve Customer Experience

So, in thinking about the importance of positive customer experience, you're probably wondering how you can effectively create or improve this. Many people might automatically turn to Voice of Customer data to start this process. While this is an essential component to building a positive customer experience (CX), it is not the only element that should be considered. Building an effective CX requires not only Voice of Customer (VoC) but also a combination of Voice of Agent (VoA), Human Intelligence and Artificial Intelligence all put together.

What's wrong with using VoC only? Traditional VoC data only provides limited insights into phone conversations and leverages rudimentary tools such as a like or dislike, or a brief Tweet. It offers no insight into the larger context and when you remember that customer experience is the sum of multiple parts, while focusing only on individual parts, you realize that you missed a large share of what really matters to the end experience.

One way to avoid this pitfall is to review both Voice of Customer and Voice of Agent data.

**From VoC, you should capture:**

- Why customers are contacting you

- What they are feeling and why
- If, when and why they churn
- Their need for products and services
- The events that can spur them to do or continue doing business with you

### **From VoA, you should capture:**

- How agents are handling customer interactions
- Training gaps and performance improvement opportunities
- Their use (or lack thereof) of the appropriate product, promotion, tools or resources
- Issues related to compliance or other critical topics

Artificial Intelligence can deliver information to you about many more elements of the overall customer experience. But, again, this is not enough as the data on its own means very little unless you do something with it. This is where Human Intelligence comes into play. The human beings in the equation can take the data and use it to make positive improvements. Let's take a closer look at what this process entails.

# 11. Using Artificial intelligence to Hear Your Customers

Since customer experience is ultimately about your customers it only stands to reason that you need to find every possible way to learn what they want and need, how they want and need it, and why they want and need it. Artificial Intelligence truly is the means of doing this in a manner able to be supported by your business. This is commonly referred to as Voice of Customer today. The very fact that there is a term dedicated to listening to your customers shows the widespread acknowledgement of its importance.

In addition, to gaining valuable information, VoC offers other benefits as well. When you ask people for their opinions, thoughts and inputs, you generate goodwill that may not otherwise be created. People appreciate being asked what they want and need as this makes them feel important and it lets them know that you truly value them and their needs. It is a key way of developing and nurturing customer loyalty.

This type of loyalty can not only contribute to repeat business but also to expand business as these happy customers will no doubt share their positive experiences with others — just as they may also share any negative experiences with others.

When it comes to analyzing Voice of Customer data, there are two ways you can do this – unstructured and structured.

- ***Unstructured VoC***

Unstructured Voice of Customer data is information you glean from any form of communication from a customer. This might be in an email, a live chat, a social media message or a live phone conversation. When you mine the data from these communications, you are accessing unstructured VoC. This term is used because you are not “officially” soliciting feedback but you are proactively taking what is said and considering it as such.

- ***Structured VoC***

In contrast, structured Voice of Customer data is that which is received in response to an official request for feedback such as in a survey or on a feedback form. Here the person knows you are asking for their input and provides comments with that in mind.

It is important to note that unstructured VoC may perhaps be one of the least-utilized yet most essential to capture. Data shows that as few as 2% of live calls are actually listened to. Of those that are heard, even fewer are actually acted on. AI speech analytics can transform this unstructured data into a structured and indexed data sheet that can be a gold mine for your company.

## 12. Leveraging AI to Make Essential Business Decisions

Every business decision you make is based on some set of facts, beliefs and presumptions. The more facts you can gather along with better quality of these facts, the better your chance of making useful decisions. This may seem elementary, yet it is amazing how many people do not stop to think about this in the context of AI and their business. In fact, many business leaders are not even certain what AI can do, or how it could be useful in their own company.

Though almost 75% of business executives believe that AI could help gain new business and over 80% seem to believe that AI can help their company attain a competitive edge, only about 20% of companies have actually started using AI in any manner. This huge disconnect between knowledge and execution is where many businesses fall behind today. And all because of the competitive edge that is gained when AI is implemented and used effectively.

Predictive analytics is one area of AI that has delivered a great deal of power to the people that are making these strategic decisions. Their hypotheses are stronger than ever with this in place. Health care is one industry that has taken great advantage of this in things such as designing treatment plans to better meet patient needs while saving money at the same time. Financial services businesses have

leveraged predictive analytics for bid strategy guidance. These are only two of a myriad of uses of this technology.

# 13. Artificial Intelligence Powered with Human Touch

While Artificial intelligence can compute large data sets as well as structure the data to make it usable, it should always be remembered that your customers are actual people, with emotions, preferences and unique behaviors. A machine may be able to reduce repetitive tasks and assist in the standard process; however, blending it with human agents help to enhance the Customer experience.

## **Artificial Intelligence can:**

- Easily handle simple/repetitive requests
- Provide insights into predictive outcomes based on machine learning
- Improve efficiency and reduce costs

## **While the Human touch helps:**

- Understanding a customer's emotion
- Gaining trust of the customer
- Handle complex requests that may need exception to standard process

Based on a 2017, Forrester Study conducted on a base of 428 managers and above with responsibility for automation and AI for global enterprises, it was found that standalone AI solutions lack below key requirements to create an exceptional CX by an average of 32%:

1. Replicating the human touch
2. AI Requiring trained staff implement and maintain AI logics
3. Another audit layer to ensure complex tasks are managed well.

# 14. AI + HI = Enhanced CX

As simple as it may sound, the formula to an enhanced customer experience requires an appropriate combining of AI and HI. This can be broken down into five main steps:

- *Listen*  
Before any assumptions are made, listen to all parties involved — customers and agents. A conversation is always two-way and getting data from both sides is the only way to fully understand it.
- *Uncover*  
Data from sources like website analytics or social media conversation should also be captured. This intelligence helps to identify consumer preferences, needs and behaviors. It may also provide further insights into agent behavior.
- *Analyze*  
Here is where all of the information should be carefully mined and reviewed, and also where AI starts to blend with HI. Eventually people will need to look at the insights from the data and make decisions.

- ***Engage***  
Conversations are a must when building customer experience. Tools like CRM systems can be leveraged to initiate these and monitor responses.
  
- ***Predict***  
Identify patterns from the data gathered and let human beings make informed decisions based on actual trends and behaviors. This is nothing new. Think of how Amazon recommends items to you based on past purchases. This is only one of many examples of this use of AI in action.

It is important here to note that any strategies for changes should be developed with a plan in place for how to measure the results of the changes. This process going from listening to predicting should not be considered linear but ongoing.

# 15. A Case Study in Artificial Intelligence + Human Intelligence

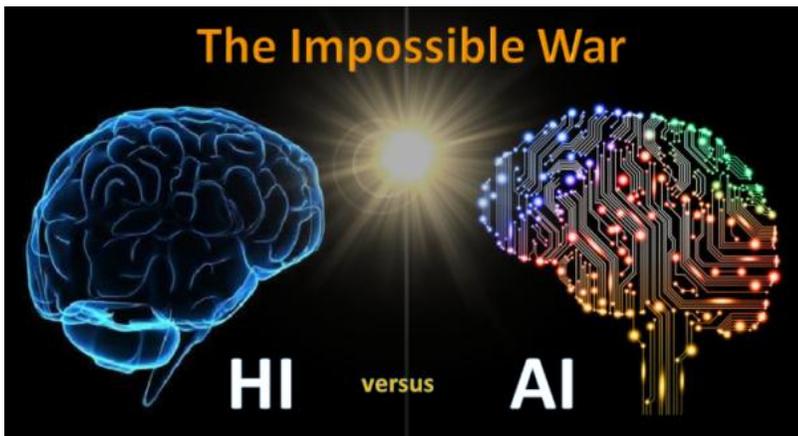
A study involving more than 400 agents across multiple queues shows how the steps outlined above can translate into significant financial results for a company. Evaluated in this particular study were service contacts for consumer purchases. Key elements of the study and its results include:

- More than 100 call categories (or reasons for calls) were identified
- Returns and exchanges were found to necessitate a high number of calls. Knowing this, further research into this category was conducted.
- 21% of calls related to returns and exchanges were eventually routed to live agents
- AI identified controllable reasons for many of the calls such as incorrect sizing or damaged goods. This information was then able to be used to

prevent these problems, thereby preventing future calls for the same reasons.

- Based on the sample size, the cost savings to the company was estimated at \$6,000. This translated into \$96,000 savings every month to the company based on overall sales.

This example shows how AI was able to classify insights into business objectives, gather detailed Voice of Customer data and make recommendations on key metrics. Overall it identified an opportunity to boost annual revenue by \$4M while simultaneously strengthening the brand value.



# 16. Why Technology – and Your Business – Need People

As the pace of technological innovations seems only to increase before our very eyes, it is important to remember the “Why” that should be behind every advancement. Technology should never be developed just because it can but because it can solve a problem, address a need or advance something. It is a means to an end and that “End” is all about a benefit to people.

The same can be said about your contact center. It does not exist for itself. It exists to serve people. This fact must never be lost on you as you look to advance your contact center and improve your customer experience. Because your contact center serves people, it still needs people. In today’s world, that may sometimes mean people who can identify and use technology to help other people.

While technology may be a foundational element of your customer experience, eliminating people from the equation would be perhaps the biggest mistake you can make. At the end of the day, your customers are people and when they really need to interact with a live human, that better be available to them. Nothing can replace a human. It’s that simple.

# 17. Revolutionize Agent Performance & Build Your Brand

Armed with a wealth of data, analysis and predictions, now it is time to put your learning to work. As you do this, it is important to remember the two big benefits to your business while doing this. First, this is the path to revolutionizing the performance of your employees. Second, building a positive customer experience is *the* way to build your brand across all channels.

What does this implementation look like? It starts by acknowledging that no two customers want the same things and then by identifying what different customers want. Then it leverages what I call the Expand-Optimize-Engage approach. In this, you expand self-service opportunities, optimize the use of your agents and subject matter experts, and engage customers at all levels. Let's take a look at this further.

- *Expand Use of Self-Service*

Some people will want to go to a website (on a laptop even instead of a phone) to get information about things like shipping or return policies. If you find that your agents are receiving a lot of calls about these policies, you might realize it is too hard to find and adjusting this to make it simpler to find

can reduce the load on your agents and simultaneously provide an effortless, enhanced customer experience.

Other customers, especially in the millennial group, might prefer forums as their way of getting information. Quora, Reddit and Apple are just a few companies that offer these. You might consider adding this to your mix again to give people what they want, when and how they want it. This can also reduce the load on your agents.

- ***Optimize Use of Agents and SMEs***

Among your employees, you have different levels of people who serve your customers. Customer experience agents can answer questions or address issues too complex for self-service methods. You pay them to be solution providers but also to do so efficiently for your sake and for the customer's sake.

Within the realm of your agents, you will have identified experts for premium needs such as personnel who work with business class customers in airlines, personal fashion consultants in retail and others. Knowing when to deploy each type of agent is critical to using your resources properly and giving the customer what they need when they need it.

At the end of the day, ENGAGING the customer with the right tool their way is the ultimate manifestation of good CX based on AI and HI together. Using your resources appropriately is an important element to doing just this.

# 18. Growth Fueled by Technology, Focused on People

It is true that technology enables you to grow your business perhaps more efficiently and cost-effectively than can be done by simply adding human employees to the mix. It is not true, however, that your business does not need people.

Perhaps one of the best proof points for this fact is the number of people employed by companies like Facebook or Google. From the perspective of someone using either of these tools or platforms, it may seem that there is only technology. However, just consider how many human beings are required to develop, deploy and maintain those technologies.

On the other side of the coin is the actual user. It is not technology that uses Facebook or Google but people. These technologies were designed with people in mind and their continued evolutions have only been more and more human-focused over the years. You cannot avoid the fact that technology is a must for growing your business but only, insofar, as you use it to serve people.

# 19. Harness the Power of Artificial Intelligence + Human Intelligence

When you appropriately marry artificial intelligence and human intelligence with a customer-first approach, you can:

- Uncover customer and business insights
- Let customers tell you how to improve your brand
- Deliver your brand promise with a white glove experience
- Hire and train the right types of agents
- Prevent problems by identifying them before they occur

In some ways, these things may seem so elementary, yet history has shown us how difficult for them to be done well on a consistent basis. As technology continues to evolve, your ability to do them well also evolves. Finding the technological solutions that are focused on solving real

## Harness the Power of Artificial Intelligence + Human Intelligence

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problems for your customers should be your goal when you evaluate different options. If a particular technology doesn't really advance your customers' experiences, you don't need it—no matter how cool it may seem. Remember, this is not about technology for technology's sake. It is instead about technology for people's sake.

Among the many lessons to be learned from how and why to focus on and build customer experience, perhaps the most important one to remember is that people matter. These people are your customers but also your employees. Your customers are the reasons you do everything you do. Your employees are the people that can take technology and put it to work for you for those customers.

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The growth of customer base and competition created a need that ensured customer satisfaction, and that their questions were being answered appropriately. This led to the creation of customer service channels through various mediums, and it became the talk of the town. Customer service required immense efforts and personal interactions between company representatives and patrons. Creating relationships and spending time with customers, ideally in person or perhaps on the phone, were the chief cornerstones to success. The politeness of personnel may well have been the single greatest benchmark used to measure that success.

As technology advanced, various forms of customer service increased to in-person interactions, phone calls, chat, email and other mediums. But at the end of the day, there was one single goal—Ensure customer satisfaction by performing certain task or transaction for the customer. That was yesterday though. As times changed, the customers also evolved. The customers of the 90s decade were satisfied if someone simply listened to them, but for today's customer, that is just not enough.



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Matt is a 36 year veteran of the call center / BPO industry. He has held key leadership positions within Dun & Bradstreet, The Berry Company (a subsidiary of Bell South), Etech, Inc. and Etech Global Services. In the past 36 years, he has spent time in every facet of call center operations and outsourcing processes. Matt is committed to sharing his experiences and helping others.



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Jim has 30 years of contact center outsourcing experience in inbound, outbound, chat operations, and social media management spanning across the globe. His expertise includes operational performance management, e-commerce sales and services with an impeccable track record of innovation and advanced business intelligence. One of his strongest suits is being able to assist customers in launching and developing their world-class customer experience solutions.