



## PLAN & RESPOND: WHY AI-POWERED SOLUTIONS ARE THE KEY TO CONTINUITY & CUSTOMER CENTRICITY

Every facet of customer contact strategy hinges on two factors: planning and responding.

Consider a support interaction. Success is a direct product of how well you *responded* to the customer's inquiry. Did you provide a suitable resolution? Did you foster a human connection throughout the conversation? Was the process convenient?

Your response, however, was the result of how well you *planned* your experience. Did you integrate channels to reduce customer effort? Did you provide agents with the training and data needed to personalize the experience and deliver the best possible resolution?

The same duality applies to other aspects of the customer contact operation, from introducing new channels, to improving agent satisfaction, to adopting a new cloud platform.

It undoubtedly applies to the recent COVID-19 pandemic. The pandemic put our *crisis response* mechanisms under the microscope. It tested whether organizations could

deliver great experiences while adapting to work-from-home, digital-first engagement, surging contact volume, serious health concerns, and tighter resources.

An effective response, of course, hinged on how well we established business continuity plans prior to the outbreak. Organizations with agile people, processes, and technologies responded to the marketplace shift far more successfully than those that never questioned the enduring relevance of the traditional "call center."

The same mindset, moreover, will apply to organizations looking to modernize their contact centers in the wake of COVID-19.

"This crisis will subside, but new crises will arise," explains Justin Sears of Lucidworks. "Any plan for the future must make you ready to respond to any crisis. Actually, when you think about it, every support ticket is a 'mini-crisis' for the user who makes the call or submits the ticket—smaller than COVID-19, but a crisis nonetheless."

Because it supports better planning and improves responses, a savvy approach to artificial intelligence is the key to simultaneously achieving business continuity and customer centricity.

This briefing reveals the specific ways AI-powered solutions can modernize the service experience, before sharing proven examples of success.

## UNDERSTANDING AND ACTING ON CUSTOMER INTENT

Whether to buy a new suit for a conference, cancel a gym membership, or receive compensation for a late food delivery, all customers have a reason for interacting. There is an *intent* behind their direct (and indirect) communication.

Insight into this intent plays a pivotal role in both *planning* and *responding*. Modern, AI-based technology plays a pivotal role in acquiring this actionable intelligence.

Leading solutions can interpret and classify customer intentions based on their underlying inquiries and behaviors. Using a combination of natural language processing and deep learning, these tools can decipher what customers really want, how they tend to pursue these outcomes, and how companies can best deliver desired results.

“Both [Lucidworks] Fusion and Smart Answers use AI to predict user intent and match that intent with the best information,” says Sears regarding examples of such technology. “If you have Fusion and Smart Answers, both of those systems are sending you millions of signals about what your users need. What are they searching for? What questions are they asking? What words are important? AI interprets those signals and constantly tunes automated systems to match intent with information.”

At the interaction level, this leads to more productive conversations. With an ability to accurately predict (if not outright know) what a given customer wants to achieve, the agent or bot can provide more efficient and valuable support. Bots can solve more problems -- and seamlessly escalate those they cannot. Less consumed with interrogating customers and digging for information, agents can demonstrate more warmth and empathy while solving problems.

“We have another add-on application called the Predictive Merchandiser, designed for merchandisers on ecommerce teams,” adds Sears. “It uses AI to analyze signals as they come in from shoppers doing what shoppers do on a website: searching for products, browsing offers, adding things to cart. Predictive Merchandiser operationalizes the fastest path between understanding what shoppers want to do and then tuning their experiences (in hundreds of different, simultaneous ways) to make them more personally rewarding.”

This insight also improves overall experience design. With AI-powered analytics uncovering patterns about how, why, and where customers interact, the organization can orchestrate better conversation flows, decision trees, and journey maps. It can help customers quickly locate the right channel for their issues, while training bots and agents to better predict and respond to particular intents. It can also make proactive engagement more viable, as companies will know which problems and needs to anticipate - and how best to preemptively address them.

The result will be more self-service and digital utilization, more effective proactive engagement, more prepared and productive agents, and ultimately happier and more loyal customers.

AI’s ability to uncover customer intent is hardly a secret; as the Market Study confirms, 64% of companies view “collecting more insight and better understanding customer intent” as an “extremely important” objective for their investments.

Nonetheless, those who act first stand to enjoy a significant competitive advantage. At present, only 6% of companies are “very successfully” analyzing customer intent.

## ADAPTING TO NEW CUSTOMER NEEDS, DEMANDS AND BEHAVIORS

To advocate for astute planning is not to feed the delusion that customer contact leaders can devise a blueprint for every conceivable scenario or a script for every possible conversation. COVID-19 provided a powerful reminder that market conditions, customer demands, and engagement tactics can change on a moment’s notice.

Planning, instead, is about ensuring the contact center and its agents can quickly respond to whatever changes may come. It is about empowering the company to remain customer-centric, even as the target moves.

Leading AI solutions foster this agility in numerous ways. First and foremost, they improve the ability to develop and leverage actionable intelligence.

“Great AI solutions, including all Lucidworks products, work so well precisely because they diminish the distance between data gathering, analysis and action,” notes Sears.

Legacy-minded operations are bottlenecked by channel-specific data collection, manual analysis processes, and silos between stakeholders; AI tools help companies instantly glean real-time insights from all channels. They then put this data into usable formats, allowing agents and bots to see and use exactly the insights they need when and where they need them.

AI-driven tools additionally help companies update scripts and knowledge bases in the face of change, such as the introduction of new regulations or unforeseen crises.

“A prospective customer at a national health agency in Europe told us that he wishes he’d had [a solution like Smart Answers] in place,” shares Sears. “His old Knowledge Base/FAQ system crumbled under the COVID-19 burden. The agency had a clear point of view on the important public health questions to answer for its citizens, but there was no way it could know ahead of time exactly how people would ask those questions ... That health agency wrote up question-answer pairs for its FAQs, but a large portion of the population did not ask the question in the right way, so they couldn’t find the answer. Those who couldn’t assumed (erroneously) that the agency did not know, or they picked up the phone and clogged that communication channel as well.”

Instead of training agents to memorize complicated new policies, companies can instantly update bots and other adaptive self-service tools to ensure compliance. Instead of attempting to guess how customers may seek support related to external crises, companies can use AI tools to listen to what customers are actually saying - and then automatically develop new scripts and conversation flows. The end result will be more productive conversations for customers, and more efficient processes for the organization.

Not simply adept at managing information, AI solutions also help companies adapt to changes in volume and channel preference. Whether by solving problems or feeding timely information to an agent, AI self-service tools improve capacity throughout the entire omnichannel journey. They allow companies to bolster their digital or voice offerings even if they do not have the opportunity to hire more employees or instantly and rigorously reallocate (and retrain) staff.

A company that was phone-centric yesterday can become chat-centric today and social media-centric tomorrow. This reality makes bots - and all AI solutions - as much about *establishing business continuity* as they are about improving efficiency.

## EMPOWERING THE MODERN CONTACT CENTER WORKFORCE

The most widespread responses to the COVID-19 pandemic were adopting work-from-home and increasing emphasis on digital engagement and self-service. As the Market Study confirms, the majority of companies will double down on these trends moving forward.

These initiatives will have significant ramifications for the agent experience, and AI can play a role in planning for (and optimizing) the transition. Agents will be able to perform more productively and respond to customers more effectively even in the face of dramatic change.

The key, of course, is recognizing AI as a way to augment, not replace, employees. It helps agents perform with *more humanity* by eliminating the robotic, repetitive tasks that stand in the way of their productivity and critical thinking. The situation is analogous to library card catalogs.

“The card catalog did not eliminate the need for the librarian; it freed the librarian to whisper with patrons about books they might like,” explains Sears. “The best use cases for AI are digital variations of what the card catalog did for the librarian.”

By virtue of resolving more issues and better qualifying customers prior to escalation, self-service chatbots stand to dramatically augment agent performance. Agents will not simply have more time to focus on complex interactions; they will be able to make these interactions more empathetic, personal and “human.”

Unwilling to settle there, astute companies will turn their self-service tools inward to improve agent desktops and processes. When internal systems better understand agent intent, they simplify the process of searching for customer and product knowledge. These benefits are particularly important in the era of remote work, given that agents will be dealing with more uncertainty and working more independently.

“The easily-answered questions are deflected by a self-service chatbot, and the agent can use the same chatbot to resolve the tougher customer questions, by following recommendations made by the exact same system,” details Sears. “After all, Smart Answers can predict the intent of the support agent just as well as it does for the customer. These exact same benefits apply to any remote workforce who submits their own support tickets to internal help desk systems. AI helps employees find the information they need in their newly remote work situation (and this is doubly effective when combined with AI-powered enterprise search). Digital assistants supplement HR, IT, and other internal departments’ ability to manage inbound requests. Popular use cases focus on company HR policies, travel policies, expense reporting, and document retention policies.”

Modern AI technology also accounts for two other remote work variables: inconsistent connection quality and unpredictable training needs.

By reducing inbound call volume and conditioning customers to trust digital channels, bots mitigate the impact of poor phone connections or noisy roommates. By simplifying knowledge management, AI tools help companies prepare agents for sudden shifts in products, policies or customer sentiment. By simplifying the search experience, AI tools reduce the impact of slow Internet or cumbersome systems. By analyzing agent performance in real-time, AI can pinpoint performance gaps and recommend training.

“AI can be ‘watching’ everyone’s work automatically to find the support strategies and communications that work best—then make those strategies available to everyone else, instantly,” explains Sears. “Managers will still ‘walk the floor’ for monitoring and coaching, but they can do that from any physical location in the world.”

Though immensely relevant for the COVID-19 response, an AI-driven agent experience empowers an agile, effective response to any sudden shift. It fundamentally frees agents from the limitations and bottlenecks of existing processes, allowing them to meaningfully engage with customers in any situation. It is the quintessential business continuity initiative.

## WELCOME RESPONSES TO GREAT PLANS

Admiring the potential of AI and achieving results are two vastly different things. The contact center community understands this distinction all too well; despite all the hype, fewer than 10% of customer contact leaders believe they have very successfully used AI to boost engagement, operational performance or customer intelligence.

In many cases, the issue stems from a faulty approach.

“Companies get burned trying to follow a project-based path to AI adoption: pick a problem, build a model, see if it works, then put it into production,” details Sears. “This ‘AI by project’ approach fails often because it requires that too many new things work well together.”

Given the contact center’s reputation for operational silos and fragmented systems, requiring “too many new things work well together” is a certain recipe for failure.

The best solutions avoid these pitfalls by emphasizing familiarity and integration.

“Bring in Fusion and Smart Answers out of the box to solve the known search or chatbot use cases, and then you’ve got ‘AI Inside,’ says Sears. “The business sees quick results. The data scientist can use her existing models and data science tools to easily plug in new models to a system that’s generating copious amounts of its own training data (signals). The developers can create new apps using familiar APIs. And the IT team gets to manage one integrated platform, rather than four or five different technologies and vendor relationships.”

Not simply promising in theory, the Lucidworks solutions have driven powerful results for recognizable brands. They have helped companies efficiently redesign journeys and account for marketplace volatility (plan) while improving the quality of customer interactions (respond).

**Company: Red Hat**

**Challenge:** Improve search result relevancy on Red Hat's customer support portal and intranet so that customers who want to self-solve are quickly connected to the solutions they're after and, if a support ticket is opened, customer support engineers find the assets they need to close the case, reducing wasted time and overhead.

**Solution & Result:** Using Fusion signals, clickstream data is tracked on Red Hat's support website, which is then fed into ML algorithms to improve relevancy. Simultaneously, if a support ticket is opened, support engineers attach any assets used to help resolve a case to the ticket, then when a similar case arises, the doc used to close the previous case is surfaced as a solution. Time decay functions are applied to boost or bury assets based on when the asset was created or last used to resolve a case. As a result of high quality relevancy, 7% of Red Hat customers are able to solve their own cases, which, for Red Hat, amounts to roughly 1,350 support tickets deflected per month.

**Company: Lenovo**

**Challenge:** Replace the search engine on Lenovo.com, serving products and support to customers in over 180 countries speaking 88 different languages, and help Lenovo enact a full digital transformation.

**Solution:** With Fusion deployed on Lenovo's customer support site, clickthrough rates and bounce rates have shown dramatic improvement. By implementing Fusion signals to track user behaviors like click, add to cart, and purchase history, machine learning algorithms automate search result ranking for the vast amount of data in their knowledge base. Relevancy, measured by how often customers click on the first result versus any subsequent result, improved by over 55% in the span of just a few months after launching signals.