

# Achieve CX Excellence with **AI-Powered** **Journey Orchestration**



## Introduction

Artificial Intelligence (AI) is enabling powerful advances across every industry and helping to solve many complex challenges and driving improved business results. In banking, for example, [financial institutions are using AI to strengthen predictive analytics, automate repetitive tasks, improve voice recognition and combat fraudulent transactions.](#) The healthcare industry is using AI to [fastrack disease detection, provide personalized treatment plans and automate diagnostics,](#) and retail organizations are using AI to [improve and automate inventory management,](#) among a host of other applications.

At the core of all of these applications is the growing importance of AI in supporting the customer experience. With AI, businesses can provide personalized, efficient and frictionless interactions with customers at scale - a requirement for organizational success in a world where consumers are accustomed to real-time service and support across their channels of choice. However, the successful implementation of AI as a value driver requires careful thought and consideration of customer needs and expectations.

In this eBook, we discuss the importance of AI for CX with a focus on how generative AI can help businesses deliver superior experiences, including use cases for how to improve customer experiences. Whether you're a C-suite executive, a support team lead, a product manager or an operations team member, this eBook will provide practical tips on using AI to drive real business value.

# The Value of Generative AI for CX

In the lightning-fast business world of today, customer experience (CX) is a make-or-break factor for success. Businesses, regardless of size, need to understand their customers' journeys, scale them up, automate tasks, empower employees to respond in real-time, and connect partners to these journeys to drive customers towards completion.

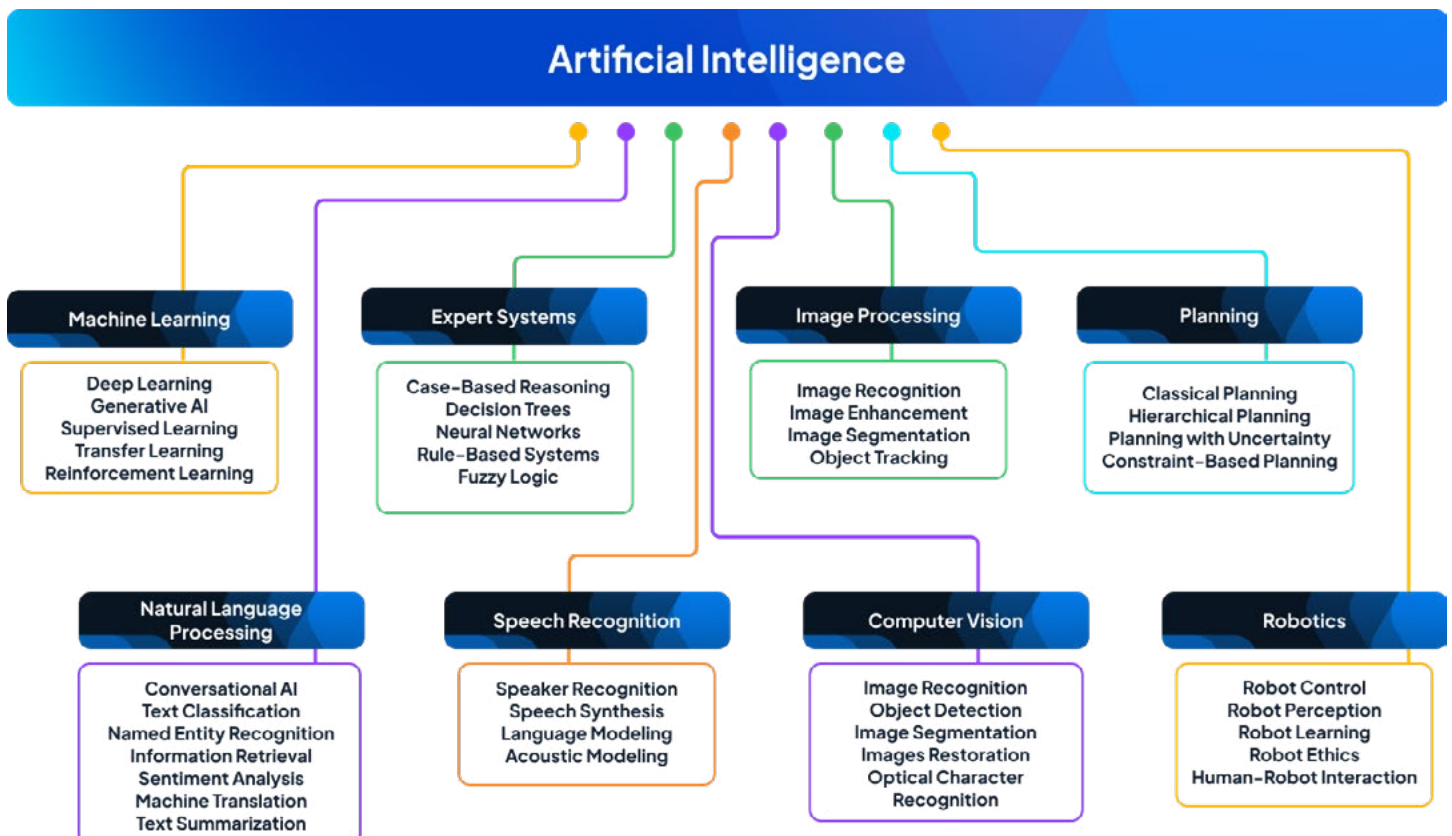
AI is revolutionizing the way organizations approach CX management, providing them with the tools and insights they need to deliver personalized and connected experiences to customers.

Before we dive into the value of AI in CX, it's important to understand what AI is and how it works.

## Artificial Intelligence: The 101

The first thing most people think about when they hear "AI" is sentient robots ready to take over the world. The reality, however, is far less eventful.

AI refers to computational technologies that can perform tasks that typically require human input by mimicking aspects of human intelligence, including learning, reasoning and self-correction. AI includes many subfields, each focused on solving specific problems. Companies leverage AI to automate tedious tasks at scale so that employees can focus their time on innovation and problem solving.



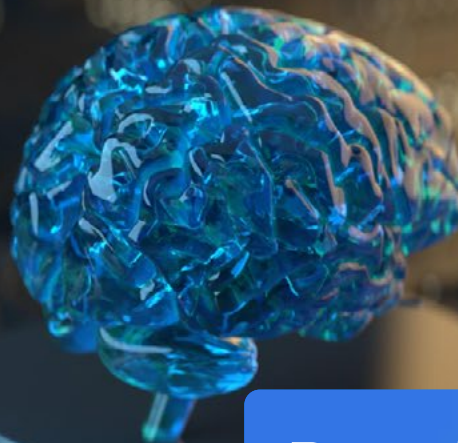
Original Source: [https://www.researchgate.net/figure/Subfields-of-Artificial-intelligence\\_fig1\\_342106972](https://www.researchgate.net/figure/Subfields-of-Artificial-intelligence_fig1_342106972)



## Overview of the main subfields of AI

- **Machine Learning (ML):** Trains computers to learn from data to identify patterns and make predictions based on new data. ML technologies are used across a host of applications including image and speech recognition, and generative modeling.
- **Analytics:** Uses computational algorithms and statistical techniques to discover, interpret, analyze and communicate meaningful patterns and insights within large amounts of data. Analytics also pinpoints outliers, recognizes changes and identifies finding actionable business insights. Analytics is generally categorized into descriptive analytics, predictive analytics and prescriptive analytics.
- **Natural Language Processing (NLP):** Enables machines to understand, interpret, and generate human language. NLP technologies are used in several applications including sentiment analysis and chatbots.
- **Expert Systems & Planning:** Mimics the decision-making abilities of human experts. Expert systems are typically used in applications such as financial planning, legal decision-making and medical diagnosis. Planning focuses on the automated synthesis and optimization of action sequences to achieve a specific goal. Planning is used in a range of applications across industry to help agents make decisions about next best actions to take.
- **Image Processing:** Focuses on the analysis, manipulation and understanding of digital images to extract meaningful information from images/ videos, improve image quality and enable automated interpretation of visual content.
- **Speech Recognition:** Involves recognizing and transcribing human speech into written text.
- **Robotics:** Involves designing, building, and programming robots to perform various tasks. Robotics technologies are used in a variety of applications across industries, including manufacturing, logistics and healthcare.
- **Computer Vision:** Enables machines to interpret and understand visual information from the world around them.

AI can be split into three main categories narrow, broad and general AI.



## Narrow AI

Narrow AI is focused on addressing very specific tasks based on “common knowledge” and limited to the tasks they are designed for. Examples of narrow AI include voice assistants like Alexa or Siri.

## General AI

General AI goes beyond narrow AI and broad AI by achieving a level of intelligence that is comparable or surpasses human capabilities. It remains an aspirational goal for AI research and is far from reaching its potential.

## Broad AI

Broad AI refers to AI systems that can understand, learn and perform a wide range of tasks similar to what a human being can do. Examples include systems within a bank that can analyze the balance sheets of corporate customers to recommend optimal hedging strategies.

For the enterprise, a fine balance between Narrow and Broad AI is optimal to support the vast majority of their use cases. Specifically, there are three core areas of AI within these domains that are critical to creating connected customer experiences:

According to PwC, [AI is set to be the key source of transformation, disruption and competitive advantage in today's fast changing economy](#), with the potential to contribute up to \$15.7 trillion to the global economy in 2030. Similarly, Global Market Intelligence firm IDC predicts companies will use [AI interactions and analytics to help automate customer engagement, eliminating over 40 percent of human touchpoints in marketing and sales](#).

# What is Generative AI, and Why is it Increasingly Important for Businesses?

Generative AI is a subset of both Machine Learning and Natural Language Processing that focuses on generating new content or outputs based on patterns from a given dataset. Generative AI models are trained using large datasets to capture underlying structures in the data, often using deep learning techniques to capture complex patterns and generate high-quality data that resembles the training data. They are also trained to iteratively adjust to minimize the difference between generated and desired outputs.

With the [release of ChatGPT in November 2022](#), the AI game changed entirely. Organizations are now looking at generative AI as a cost-efficiency engine across their business. Although there is a long way to go in this regard, especially when it comes to brand control, accountability and quality, the reality of today's business landscape is simple: Organizations that fail to capitalize on the potential of generative AI risk falling far behind their competitors.

## The CX Imperative

Today's consumer has an abundance of options for almost every product imaginable, making it easy to switch brands with a few clicks of a button if their expectations are not met.

According to [PwC's Customer Loyalty Survey 2022](#), more than 25% of respondents had stopped using or buying from a business in the past year, largely because of poor experiences and subpar customer service. Similar numbers are echoed across other recent customer loyalty and satisfaction surveys, signaling an important reality: in a world where product differentiation is diminishing across competitors, CX is the ultimate differentiator when it comes to customer satisfaction, loyalty and business success.

# Top CX Challenges

However, providing exceptional CX is not without its challenges. Some of today's top CX challenges are:

- **Data Silos:** Managing and analyzing customer data is absolutely critical for delivering personalized experiences. However, data is holed up in different systems making it difficult to collect, process and use effectively.
- **Poor cross-organization collaboration:** Shared data visibility across third-party providers and partner organizations is either limited or non-existent, leading to collaboration breakdowns that ultimately impact the customer experience.
- **Subpar Personalization:** When team members can only see a sliver of the customer journey, companies are not able to track and take care of customers from end to end. That includes delivering personalized experiences in real time.
- **Omnichannel Communication:** Today's customer interacts with businesses across multiple channels but employees and agents are not able to provide a seamless experience across all these channels. Customers are forced to repeat their question or concern multiple times, sometimes across multiple teams and departments - a frustrating experience for everyone involved.
- **Varied Customer Issues:** No two problems are the same. Customers present a wide range of issues and challenges, making it challenging for enterprises to anticipate and address them effectively.
- **Proactive Issue Resolution:** Thanks to the experiences provided by Amazon and Netflix, customers have become accustomed to their services understanding who they are, what they want and where they could run into an issue. For most businesses, anticipating and resolving customer issues before they become problems is far from reality.
- **Employee Experience:** Employees are rarely equipped with the tools and resources needed to deliver excellent customer experiences in the moment
- **Incomplete Insights:** Even though technology continues to develop at a rapid rate, businesses haven't kept up by continually investing in tools that help them understand how to measure, analyze and improve their CX efforts.

# Benefits of Generative AI for CX

When properly implemented, generative AI expands the scope of what can be automated across several fields. From this foundation, it can support businesses in overcoming the hurdles that prevent them from delivering outstanding CX:

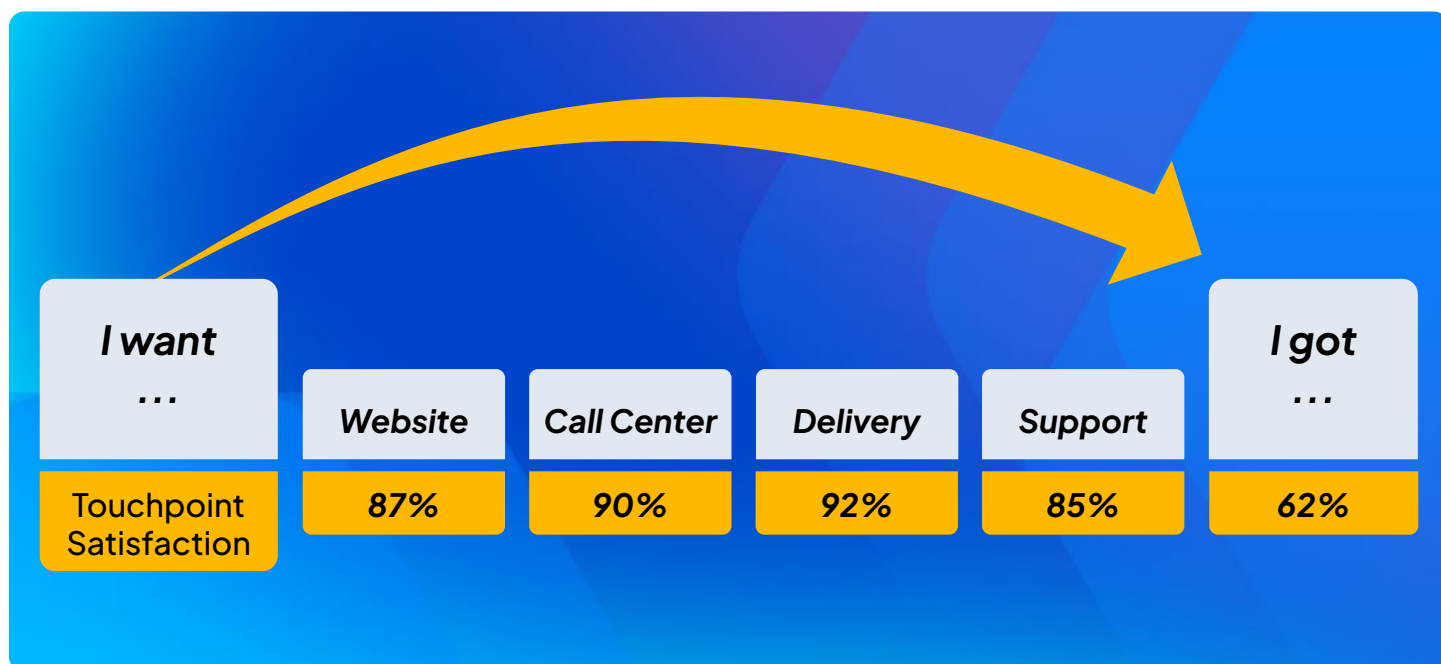
- **Data Management:** Businesses can collect, process and use customer data more effectively. AI technologies can support the quick delivery of a unified customer view, enabling informed customer engagement across all channels.
- **Shared Customer Visibility:** Your customer experiences can depend on seamless collaboration with your partners. Save time by generating summaries and insights that span organizational boundaries without needing to review every note and transcript in detail.
- **Personalization:** Generative AI models offer the ability to quickly analyze customer data to provide recommendations, content, and offers tailored to individual preferences. It can also analyze past customer behaviors and purchase history to generate personalized recommendations and present them in a tone that resonates with the specific customer.
- **Omnichannel Engagement:** Generative AI can create interactive experiences through virtual assistants and interactive content to engage customers in providing real-time assistance and offering personalized support.
- **Intelligent Issue Comprehension:** AI systems can be trained on a diverse set of scenarios, enabling a better understanding of customer needs and providing appropriate resolutions.
- **Proactive Issue Resolution:** AI-powered tools can monitor customer interactions in real-time, identify patterns and trends, and analyze data that could indicate a problem long before it ever becomes one.
- **Employee Experience:** Generative AI can support employees by quickly pulling up and delivering relevant information, summarizing information, understanding sentiment and automating mundane, manual tasks that may add to employee burnout.
- **Superior CX Analytics Tools:** Identify patterns and trends in customer behavior quickly, allowing for more informed approaches towards CX improvements.



# AI-Powered Journey Orchestration for Superior CX

Customers judge their experience with a brand on their entire relationship with the business, not individual touchpoints. If businesses can't connect these touchpoints, they will fail to meet their customers' expectations.

Most organizations today are wired, both from an operational and technology standpoint, to be focused on these individual interactions. Yet, study after study has shown that customers can have excellent individual interactions but mediocre overall experiences.



For example, imagine you are a bank and your merchant services customer is waiting to receive a new product from you. Your business has a beautiful, well-designed website but the information your customer needs about when they can expect to receive their product is not readily available. The customer follows up with a call to your call center and very supportive call agents are able to give them general information, but not the exact information about where their product is and when it will arrive - they also have no view into where it may be with third-party partners, so it will be a few more calls and emails before the customer receives clarity, if at all. When the customer finally receives their package, they have questions about how to set up the product and must reach out again to find knowledgeable employees to answer their questions.

Even if the customer rates each individual touchpoint highly in a post-interaction survey, the lack of connectedness and access to personalized information in the moment makes the overall experience subpar. Satisfactory touchpoints do not equal excellent experiences.



## Level Up Your Journey Orchestration with Generative AI

A customer journey spans the entire length of time from a customer's initial engagement with an organization to becoming an active, paying user of its products and services. This overarching customer journey is made up of smaller journeys that are overseen and orchestrated by different organizational departments.

Since most teams are built around functional areas, they tend to deliver a specific experience using their own processes and platforms. Customer journey mapping can help you create the optimal experience for customers by getting internal teams out of their functional silos and thinking about how customers engage with your organization as they move between different departments, teams and third-parties to get from start to finish. A [customer journey map](#) includes more than just the touchpoints they interact with - it's about understanding their perspective, behavior, feelings and attitudes to really understand where the gaps in their experience exist and how to help bridge them.

***“[Seventy-nine percent of companies say customer journey maps have led them to become more customer-centric.](#)”***

Once you have your visual journey map, it's time to use it to orchestrate that experience at scale with [journey orchestration](#). Customer journey orchestration brings all the touchpoints together by understanding the context of each interaction, as outlined in the journey map, and makes real-time decisions about the next best step in the journey.

Generative AI can help take your journey orchestration efforts to the next level by empowering your employees with the information they need to deliver the information a customer needs to complete their journey in real time. Specifically, generative AI can help support customer journey orchestration by automating the process of extracting key information and generating concise summaries.



## Six Applications/Use Cases of Generative AI in Journey Orchestration

Generative AI models are only as good as the data they have access to. While large language models are very powerful, they require fine-tuning with an organization's specific knowledge, workflow & automation meta-data, and data to provide real value for the specific questions that they receive. Opportunities to improve the models are abundant but training and supervision is required.

With that said, here are six key applications/use cases where generative AI can supercharge customer journey orchestration:

**Extract**

**Summarize**

**Suggest**

**Answer**

**Improve**

**Insights**

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## Extract

Businesses can train generative AI models to extract relevant information from customer case data in customer support tickets, chat transcripts, and survey feedback. Automating this process will help time, reduce effort, and ensure accuracy in data capture. Specific customer details for extraction would include:

- **Historical interactions:** Generate actionable insights to optimize the customer journey with a goal to understand the context, topics and sentiments expressed in past interactions.
- **Issues and challenges:** Gain a comprehensive understanding of customer pain points and take proactive measures to address them by using generative AI to identify and categorize key problem areas and challenges faced by customers across various data sources.
- **Touchpoints:** Better visualize the end-to-end customer journey by training generative AI models to identify touchpoints that customers interact with, including the optimal sequencing of touchpoints to create a more engaging experience.
- **Expressed sentiments:** Gauge customer satisfaction and improve business actions by analyzing and extracting customer sentiment across reviews, feedback, chats to determine whether their sentiments are positive, negative or neutral.

## Summarize

Generative AI models can be trained to summarize large sets of data across multiple related objects into simple and clear summaries. In doing so, companies can save significant time as well as equip teams with the context they need to provide better experiences to end-customers. These can include summaries of:

- **A Single Engagement:** Get context and insight of the engagement quickly, including details from notes, customer conversations, events timeline and steps taken towards resolution.
- **Multiple Engagements:** Summarize multiple connected cases to capture bigger issues that span multiple interactions, teams and, ideally, external organizations.
- **Customer Journeys:** Generate text summaries of any active or completed customer journey, including all relevant cases, tasks, automations, emails, and chats.

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## Suggest

Building off of generative AI's summarization capabilities, organizations can train models to suggest relevant answers to internal teams and users. Employees receive content directly versus having to search for information across legacy enterprise systems, thereby saving time and effort.

- **Knowledge Search:** Find answers to questions quickly by delivering specific generated answers, versus links to knowledge articles, to both internal teams and customers looking for information to self-serve.
- **Knowledge Suggestions:** Deliver specific generated answers to employees working on a customer query and ensure quality control by offering employees the ability to review and approve answers before responding to a customer.
- **Conversation Response Suggestions:** Generate responses as quick replies in real-time based on the customer context and conversation history, including tailoring suggestions to better fit the communication type (email, chats, SMS).
- **Similar Cases:** Uncover patterns or issues that need to be addressed across similar customer interactions to provide relevant real-time recommendations and decrease resolution time.

## Answer

As generative AI models begin to perform well, businesses can increase their focus into delivering answers directly to end-customers in omni-channel environments.

- **Chat Conversational Fallback:** Resolve a higher number of cases without escalating to humans by training AI models to generate consistent fallback responses when dealing with uncommon questions. Generative AI can look through all available sources of content (knowledge articles, email history, your website, etc.) and generate a relevant response.
- **Email Responses:** Automate email responses with high quality and proper monitoring to save time and free up teams to work on more complex problems that require their attention.
- **Customer-Facing Knowledge:** Add generated answers to the customers' search queries within different available knowledge libraries in snippet form.

# Six Applications/Use Cases of Generative AI in Journey Orchestration

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## Improve

With ongoing training of the generative AI models, there is an evergreen opportunity to improve experiences. One key way is through Q&A Response Generation.

**Q&A Response Generation:** Businesses can generate both questions and answers for customers' top questions, including whether teams are responding accurately to the queries. Strong AI-powered platforms can review conversations across chat, sms, and email and generate a list of the top questions that customers are asking and also how agents are responding to those questions.

Combining this data with additional relevant context, such as the interaction rating, journey status sentiment, customer product information, and more will allow teams to provide relevant answers to questions quickly. Models can also be trained to learn and adapt during this process, allowing for more fine-tuning of responses as engagements evolve.

## Insights

Outside of empowering customers and customer-facing teams with generative AI, we believe there is also a large use case for empowering organizational leaders to quickly and easily make better decisions with their data without the need for complex data analysis, specialist tools, or dedicated analysts.

Specifically, organizations have the opportunity to leverage generative AI to augment visual dashboards to answer quick questions and provide flexible insights that could only previously be unlocked with a lot of time, effort and technical expertise. Some critical insights that can be gleaned include:

1. What are the most common customer problems?
2. What teams have the biggest queue?
3. Which journeys have the least churn?
4. What are the most escalated cases?
5. Which teams have to escalate the most interactions?
6. How can we optimize a specific Journey?
7. Which ecosystem partner resolves cases the fastest?
8. What are the overall sentiments of the customers?
9. How can I improve the overall Health Score of my customers?



## Conclusion

Generative AI is a game-changer for businesses across industries. The capacity to automate content generation, optimize touchpoints and analyze large volumes of data can help businesses dramatically improve customer engagement and satisfaction. With generative AI, businesses can uncover valuable insights and take charge of customer and employee outcomes at scale.

OvationCXM is implementing generative AI use cases in our CXMEngine® platform to elevate how our customers and partners deliver exceptional customer experiences, including AI-powered data extraction, case and engagement summarization, real-time suggestions and powerful analytics.

CXMEngine is OvationCXM's enterprise-ready no/low-code SaaS platform that empowers companies to manage their customer experience from end-to-end with precise control. It's the first of its kind to bolt onto an organization's legacy systems, extending their value and acting as a central hub that aggregates all customer interaction data - from internal systems and partners - into one screen.

Teams can better see and guide customers, in the key moments that matter while they are in the middle of the sales, onboarding, activation, support or servicing journey within organizations. Journeys can be built specifically for different customer segments, leveraging automations and nudges to help customers move from point A to B.

Since our platform was built from the ground up with all the features, functionality, workflows, interfaces, connectors, deep data capture, and security that enterprise organizations require, CXMEngine helps businesses across all industries deliver high quality customer service and business performance quickly.

Do you want to see how OvationCXM's platform is unleashing the power of generative AI for customer journey orchestration? Visit [ovationcxm.com](https://ovationcxm.com) today and see CXMEngine in action.



## About OvationCXM

OvationCXM is the market-leading customer experience management (CXM) provider that helps organizations identify friction in the customer experience. It's an all-in-one platform to build, manage, and track customer journeys across every digital, internal back-office, and partner ecosystem touchpoint. Clients have significantly decreased customer churn, tripled NPS and ENPS scores, improved partner collaboration, and increased revenue. OvationCXM's expansive aggregation of operational and experience analytics, generative and conversational AI, and knowledge management adds fuel to customer journeys and deepens the comprehensive view of the customer's total engagement with organizations and their internal systems and partners throughout the customer journey, so transformation happens in real-time. Customer journeys are complex, but building and managing them doesn't have to be. To learn more, visit [ovationcxm.com](https://ovationcxm.com).