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Guide to Gen AI for CRM: Improving human connections between buyers and brands

A Deloitte Digital Perspective
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INTRODUCTION

Generative AI can unlock untapped value for customers and organizations

Over the past year, the emerging possibilities of Generative AI (Gen AI) have been awe inspiring. Today, however, leaders are beginning to look past the hype to separate facts from fiction and identify the best ways to get started in leveraging this technology to create tangible value. **We believe one of the most powerful applications of Gen AI is in managing customer interactions.** Implementing it effectively can improve customer engagement, deliver better employee experiences, and increase the human connections between buyers and brands. But achieving these outcomes will require both creativity and the ability to execute.
Managing Customer Interactions with Gen AI and CRM

Many companies have sought to improve customer experiences through technology the last few years. The focus has been on trying to make interactions more responsive and personalized, increasing digital capabilities and self-service, being more predictable, and more efficient. Results have been mixed, with many organizations still facing complex and manual processes, insufficient insights from data, and inconsistent adoption of new capabilities. However, Gen AI provides a renewed opportunity to address these challenges and accelerate unprecedented change and impact.

While Gen AI has potential across the enterprise, one of the most impactful applications will be in creating new experiences for customers, partners, and employees across each of the customer-impacting functional domains. These new Gen AI solutions will be woven into the organization’s Customer Relationship Management (CRM) ecosystem.

CRM in the context of this guide refers to all the capabilities that touch and enable customer interactions, including the applications, data, orchestration, and workflow that supports Marketing, Sales, Commerce, Service, and Customer Success functions.
Demystifying emerging Gen AI technology through key guiding principles

There are myriad questions that come to mind when considering applying any emerging technology, especially Gen AI. What are the best use cases? How should I divide investments in Gen AI across my organization for the greatest return? How will it impact the trust and relationships I have built with customers and employees? These are all the right questions to be asking, as this inflection point can either allow organizations to leap into a new era of prosperity or stumble by not taking the right strategic steps. To help ensure the former, consider the following key principles.

Key Guiding Principles

1. Understand end-to-end interactions and design across silos
2. Focus on tangible business value
3. Design for Trusted AI by thinking beyond the data
4. Be pragmatic and start through experimentation

This guide will explore these principles by starting with applications across the customer journey, then diving into which use cases have highest business value for each functional domain, and then concluding with chapters on Trusted AI for CRM and how to get started. First, let’s look at what the possibilities are when it all comes together...
Applications across the customer journey

1. Understand end-to-end customer journey and design across silos

Organizations should start with the buyer personas and interactions across end-to-end touchpoints. Siloed solutions can result in not only a variety of models and architectures, but also disconnected interactions. We begin by exploring interactions across an end-to-end customer journey (Exhibit 1). However, each organization will need to think creatively about their own target experiences.

In the remaining document, we will deep dive into each domain, but we believe winners will be the ones who best orchestrate across them.

Exhibit 1

- **CUSTOMERS**
  - **IDENTIFY**
    - Find prospects, understand needs, and draft sales calendar
  - **PRE-SALE ADOPT**
    - Write emails, take notes, capture actions, and send invites
  - **PURCHASE**
    - Search catalog, generate custom offer
    - Customize offer based on trial data and conversations
    - Get predictive recommended actions to close deals
  - **ONBOARD**
    - Monitor real-time business outcomes
    - Obtain customer usage insights and prevent fulfillment issues
  - **USE / MANAGE**
    - Access personalized business value realization reports
    - Obtain data on customer satisfaction and friction
  - **EXPAND / RENEW**
    - Generate scripts to showcase new product value propositions

- **SELLERS**
  - **IDENTIFY**
    - Get personalized product recommendations
  - **PRE-SALE ADOPT**
    - Receive trials automatically generated for unique needs
    - Obtain offer that meets needs
  - **PURCHASE**
    - Receive personalized training materials
  - **ONBOARD**
    - Get hints to leverage new product features for additional use cases
  - **USE / MANAGE**
    - Auto-generate renewal quotes with competitive pricing and mix
  - **EXPAND / RENEW**
    - Access personalized business value realization reports
    - Generate scripts to showcase new product value propositions
Realizing business value and maintaining trust

2. Focus on tangible business value

One of the risks with new technology such as Gen AI is building capabilities without a clear plan for how it will generate business value. To get meaningful value from Gen AI, it’s important to start with integrated use cases in the context of customer, partner, and employee interactions, and then design solutions that leverage Gen AI along with other technologies and not just Gen AI on its own.

The true potential of Gen AI is harnessed when integrated with other technologies such as predictive AI, voice, experience management, and workflow technology, and when it's connected to processes and user interaction capabilities.

Each use case should be evaluated and measured in terms of tangible value, including feasibility, adoption, and the impact it has on customer and seller interactions. For example, does it make customer interactions more personalized or faster? Does it create a new or differentiating experience? And will it help employees spend more time on higher value activities?

3. Design for Trusted AI by thinking beyond the data

Trust and ethics are hot topics around Gen AI, but we believe there are unique considerations that must be factored when we design for the customer domain. Trusted AI for CRM must go beyond just thinking about data privacy, but also the impacts on customers, partners, and sellers. Broken or impaired trust with these individuals is hard to repair and directly impacts business results.

Customers lose trust when the personalized communications they receive turn out be from a machine versus the human they thought they were interacting with. And sellers may be concerned that digital assistants could steal and automate the secret sauce that makes them successful in a competitive sales environment.

We will explore how Trust must be proactively designed for across both machine (e.g., data, models) and human (e.g., transparency) elements, and how reinforcement learning from human feedback can build trusted AI.
Getting started

4. Be pragmatic and start through experimentation

Taking a pragmatic approach to Gen AI implementation will help identify the use cases that work best for your organization, deliver promised value, and uncover risks that need to be addressed. This means beginning with experiments and learning quickly.

Gen AI will not be uniformly successful across every organization due to differences in business models and selling motions, culture and expectations, and data accuracy and availability. Additionally, there are various approaches to model and application architecture to be considered and it won’t be a one-size fits all solution even for the use cases within one organization.

By starting with an understanding of which use cases will create the most meaningful value, and designing for end-to-end interactions, commercial and operational leaders will be able to prioritize the best candidates to begin piloting new Gen AI capabilities and integrating into the processes of their organizations. Exhibit 2 explores the key steps to consider when beginning your Gen AI for CRM program. We’ll conclude this document by exploring how to get started and scale the capability in more detail.
Functional Domain Deep Dive

Marketing 02
Introduction: Gen AI and Marketing

Generative AI can catalyze an inflection point for the marketing function by enacting personalization at scale.

Given the domain’s inherent focus on content creation and creative generation, the marketing function will inevitably become an arena where Gen AI can drive massive transformation, enabling marketers to shape better strategies, optimize campaigns for improved brand outcomes, and more quickly connect with customers on a more personal level. Gen AI already does a lot to increase marketer output, efficiency, and creativity. It can produce text and images, generate creative briefs, and develop multiple versions of ad campaigns customized by geography and language. As the technology matures, it is expected that marketers will play a critical role in helping lead the Gen AI charge as their respective organizations experiment and evolve.

**KEY POTENTIAL BENEFITS FOR MARKETERS**

- **Keep customers first** by quickly scaling more personalized and engaging experiences, staying ahead of the competition, and going to market faster
- **Enhance marketing teams** by improving creative ideation, enhancing productivity, leveraging data more efficiently for decision making, and scaling marketing initiatives across platforms, segments, and regions
- **Optimize costs** by reducing the cost of content development, localization, and multi-brand management, and decreasing the marginal cost of personalization

Although many marketers are racing to explore and experiment with Gen AI, even the most mature organizations are just getting started. Without the right data management, tech stack, governance, and operational capabilities, organizations can fail to fully capitalize on this once in a generation opportunity. Speed is of the essence but marketers should be thoughtful about implementation, recognize the possibilities and limitation of Gen AI, and proceed with the right foundations in place.

In this chapter we explore the following use cases: Content Creation, Transcreation, Partner Co-Marketing, Social Media Sentiment Analysis, and Search.
Gen AI Capabilities and Use Cases for Marketing

Consumers are demanding more personalized and engaging content. Gen AI enables marketers to deliver on this promise while driving cost savings, speed to market, and workflow efficiency.

**What AI Can Do For:**

- **DISCOVER**
  - Receive co-branded marketing collateral
  - Receive hyper-localized marketing content
  - Get targeted product recommendations

- **EVALUATE / TRY**
  - Access personalized offers
  - Receive tailored messaging when trial is about to end
  - Receive curated training / how-to’s

- **BUY**
  - Get personalized notifications
  - Receive personalized recommendations
  - Get targeted discounts

- **USE**
  - Get relevant offers and content based on purchase
  - Receive follow up service or support notifications
  - Get targeted discounts

- **EXPAND / RENEW**
  - Receive personalized notifications of new features
  - Get placed onto prioritized distribution lists for product drops
  - Obtain renewal and extension offers

**CUSTOMERS**

- **STRATEGIC PLANNING**
  - Generate marketing plans, including identifying the highest-potential initiatives and assess marketing budgeting decisions

- **CAMPAIGN PLANNING**
  - Assess competitor and influencer content to identify tactics to engage audiences; Craft channel strategy and summarize campaign goals

- **CREATIVE CONCEPT and MEDIA PLANNING**
  - Generate images across formats based on brand guidelines; Extract insights to inform media planning and generate ideas

- **PRODUCTION**
  - Automate content production (social, blogs, email campaigns); generate co-marketing content, convert 2D to 3D; customize collateral; regionalize w/ transcreation and localization

- **ACTIVATION**
  - Leverage social sensing and sentiment analysis to develop, post, and optimize social trending collateral, quickly set up UI web pages and materials with autonomous coding

- **MEASUREMENT**
  - Aggregate insights to generate reporting, aggregate insights into KPIs, automate risk and quality compliance reviews

**MARKETER USE CASES TYPICALLY SPAN THE ENTIRE CUSTOMER JOURNEY**

**CUSTOMER CROSS JOURNEY POTENTIAL BENEFITS**

- Enhanced Experience
- Higher Engagement
- Greater Personalization
- Omnichannel Consistency

**MARKETER CROSS JOURNEY POTENTIAL BENEFITS**

- Improved Marketer Efficiency
- Increased Speed To Market
- Enhanced Customer Offerings
- Faster Product Adoption

**Value Provided**

- Enhanced Experience
- Higher Engagement
- Greater Personalization
- Omnichannel Consistency

- Improved Satisfaction
- Better Discovery and Search Outcomes
- Increased Variety

- More Relevant Content
- Better Targeted Offers and Notifications
- Tailored Support

- Improved Marketer Efficiency
- Increased Conversion
- Greater Brand Reach
- Increased LTV

- Higher Revenue
- Lower Agency Costs
- Improved Use of Co-Marketing Funds
Content Creation
Creative Horizons Expanded: Accelerating Speed-to-Market and Scale Using Gen AI

Gen AI has the potential to enhance content creation across all formats (social media posts, ad and web promotional copy, email marketing, etc.) by intelligently selecting and tailoring content elements that maximize end user engagement across the marketing funnel, catalyze conversion rates, and enhance brand outcomes.

Issues and opportunities
Leveraging AI for marketing content creation can revolutionize how marketing organizations engage with and across audiences.

Conventional (manual) content creation methods are time-consuming and often lack the agility to both be specific to a consumer’s needs and adapt as the person’s needs evolve over time.

With AI-generated content, companies can drive creative generation at scale across multiple content formats and across desired campaign and marketing outcomes. This helps brands deliver the right messages, through the right channels, and at the right times to target audiences, maximizing the potential for brand impact and sustainable growth.

How Gen AI can help
1. Multiformat content creation: Gen AI can generate content across diverse formats (i.e., blogs, social media posts, email campaigns) by analyzing existing content, understanding the target audience, and generating copy for the desired format, tone, and campaign outcome. This allows marketers to more efficiently scale content across platforms and channels.

2. A/B testing and optimization: Gen AI can generate multiple content variants for A/B testing. It helps marketers identify which content resonates best with the audience and refine content strategies accordingly to drive greater engagement and conversion.

3. Integration into existing workflow: Gen AI can be integrated into a marketer’s existing workflow eliminating for multiple content generation tools or processes. Marketers can directly input requirements and refine AI-generated content within established processes.

Gen AI has the potential to enhance content creation across all formats (social media posts, ad and web promotional copy, email marketing, etc.) by intelligently selecting and tailoring content elements that maximize end user engagement across the marketing funnel, catalyze conversion rates, and enhance brand outcomes.

This applies if you have...
• Diverse content needs across audiences and customer segments
• Varied customers requiring different messages
• Limited capacity with the marketing / creative teams
• Decentralized content creation process
• Slow time to market

Potential benefits

Improved customer engagement
Deliver content that resonates with preferences and results in deeper connections and more meaningful interactions.

Personalization at scale
Better tailor content to individual preferences to foster stronger connections and drive improved engagement.

Efficiency and time savings
Free marketers from time-consuming manual tasks and unlock prioritization of strategic planning and creative engagement.
Transcreation
Across Borders and Languages: Enhancing Messaging with Gen AI Transcreation

Gen AI can elevate global marketing campaigns through transcreation and localization that preserves cultural nuances, resonates across diverse localized audiences, and helps drive successful brand outcomes across markets and geographies.

Issues and opportunities
Transcreation refers to the adaption of content from one local market to another while preserving its intended message, tone, and cultural nuances. This process, which takes translation a step further, has long been a critical component to global marketing campaigns and activations.

The process involves capturing the essence and tone of the original content while tailoring it to resonate within a different cultural context. It requires a deep understanding of both the source and target languages and culture, as well as the nuances that make each unique. For example, transcreation includes both language translation as well as localization of images for a specific market (i.e., changing a U.S.-market fire hydrant to its equivalent in the U.K.).

Generative AI removes the significant complexity and overhead of transcreation by delivering linguistically and culturally accurate content that can lead to better campaign engagement worldwide.

How Gen AI can help

1. Cultural adaptation: Gen AI can analyze the cultural nuances of both the source and target languages. It helps ensure that the transcreated content not only accurately translates words but also captures the cultural context, idioms, references, and sentiment leading to higher customer engagement globally.

2. Maintaining brand voice: Transcreation enables consistency in the brand’s tone and voice. Gen AI can generate content that aligns with the brand’s identity while matching the complex linguistic and cultural specifics of the target audience.

3. Localization for various channels: Different regions might have preferred marketing channels. Gen AI can adapt transcreated content for various platforms, such as social media, websites, or print.

This applies if you have...

- International presence with content localization needs
- Imperative to maintain cultural relevance in global markets
- Challenges with accurate translation and adapting messaging
- Efforts to streamline and speed up transcreation processes
Partner Co-Marketing
Collaborative Success Unleashed: Elevating Joint Campaigns with Gen AI

Gen AI enables more effective partner co-marketing by enhancing collaboration and shaping content that increases customer engagement, while also optimizing brand resonance for improved audience reach.

Issues and opportunities
Partner marketing, while highly effective, often involves complex, resource-intensive, and time-consuming coordination and content creation processes across multiple partners. The integration of Gen AI transforms workflows by unlocking the ability to deliver engaging and effective co-branded collateral in less time.

Gen AI streamlines content creation and distribution by rapidly generating an array of co-branded partner marketing materials, including social media posts, blog articles, white papers, and advertisements. This solution helps ensure consistent messaging and compliance with partner program guidelines, while also expediting campaign creation and deployment. The technology's agility in adapting to market trends and audience preferences enhances personalization and engagement, which helps partners maintain a competitive edge.

How Gen AI can help

1. **Collaborative content generation**: Gen AI can generate co-marketing content that aligns with the messaging and branding of both partners, as well as formalized partner program guidelines. It analyzes each partner's content style and merges both to create cohesive materials that better resonate with the shared target audience.

2. **Cross-platform adaptation**: Co-marketing often involves promoting content across different platforms. Gen AI can adapt content for various platforms, help ensure consistency, and optimize the content for each channel to enhance user engagement.

3. **Integration into partner workflows**: Gen AI can integrate into the workflows of both partners, reducing workflow steps and coordination, and increasing the convenience of collaborating on marketing materials.

This applies if you have...

- Collaborative campaigns with other brands or companies
- Goals to expand reach through shared marketing efforts
- Messaging needs requiring partner alignment and cross-promotion

Potential benefits

**Expanded audience reach**
Better target new segments that may not have been considered by identifying audience overlaps and opportunities between partners.

**Increased brand visibility**
Enhance brand visibility by generating a more consistent flow of captivating co-marketing content.

**Efficiency and time savings**
Free marketers from time-consuming manual tasks and unlock prioritization of strategic planning and creative.
Social Media Sentiment Analysis

Unlocking Audience Insights: Harnessing Gen AI to Decode Trends and Sentiment

Gen AI’s evolving capabilities can empower your brand with real-time insights into shifting customer perceptions and emerging trends. This new capability can enhance a marketer’s ability to adapt customer engagement strategies in real time and make data-driven decisions to enhance customer engagement.

Issues and opportunities

The proliferation of social media content has amplified the importance of understanding consumer sentiment in real time. Currently social media production and management is often outsourced to 3rd party agencies and drives significant spend across production, marketing and advertising.

Gen AI can complement existing analytical social media monitoring methods to accelerate the “so what” analysis. The technology can process vast quantities of social media content and extract insights driven by evolving opinions and trends. This unlocks marketer agility to more quickly evolve campaigns, as well as marketer capacity to capitalize on emerging opportunities that lead to better customer outcomes.

How Gen AI can help

1. **Sentiment classification**: Gen AI can accurately collate and classify social media posts and comments into positive, negative, or neutral sentiments, providing a quick, real-time overview of customer sentiment trends.

2. **Topic and keyword analysis**: Gen AI can extract key topics and keywords associated with positive or negative sentiments, helping brands identify which aspects of their products, campaigns, or messaging resonate with audiences.

3. **Competitor analysis**: Gen AI can quickly analyze sentiment and activation across a broad competitive set, to inform competitive benchmarking and diligence. These insights can augment a marketer’s ability to deploy content in real time that helps position brands ahead of their competition.

This applies if you have...

- Teams monitoring public perception of brand or campaigns
- Efforts to act on emerging trends and shifts in sentiment
- Ongoing crisis detection and management needs
- Customer engagement and brand loyalty gaps

Potential benefits

- **Optimized customer engagement**: Deliver more personalized and authentic content by tapping into deep insights and real time analysis.

- **Real-time insights**: Act on emerging trends and proactively manage brand risk by understanding changes in real time.

- **Cost savings**: Deliver longer-term cost savings by complementing existing social media monitoring with Gen AI solutions.
Search (SEO and SEM)

Digital Visibility Amplified: Navigating the Online Landscape with Gen AI

Gen AI can enhance a brand’s approach to search engine optimization (SEO) and content creation, by enabling marketers to unlock real-time insights into search trends that help fine-tune SEO strategies and amplify online visibility, user engagement, and digital brand presence.

Issues and opportunities

The ongoing growth of search activity has led to an ever-increasing amount of data which has complicated marketer decisioning around search terms and SEO outcomes. Marketers often use manual methods for keyword ideation which hinders operational efficiency and the ability to scale rapidly.

Gen AI helps quickly decipher extensive search data to generate predictive search trends from enterprise data and machine learning to forecast content needs for topics by month. This automated method enhances accuracy, guiding improved data-driven decisions around search terms and strategies.

By leveraging Gen AI for Search, brands can predict emerging trends, optimize content strategies, and adapt to user behavior shifts. This enables marketers to drive improved brand visibility and engagement in a dynamically evolving digital landscape.

How Gen AI can help

1. **Keyword optimization:** By analyzing user search behavior in greater detail and at scale, Gen AI can pinpoint keywords that customers actively use to find relevant content. Brands can then strategically incorporate these keywords into their content planning, boosting visibility in search results and driving incremental organic traffic.

2. **Trend prediction:** With the ability to analyze substantial search data, Gen AI detects emerging trends in user queries and interests. This predictive insight empowers brands to adapt content strategies proactively. By creating content aligned with these trends, brands can capture higher search rankings and user engagement, staying ahead of evolving preferences.

3. **User intent analysis:** Gen AI can determine whether users seek information, want to make a purchase, or need solutions. By aligning content with user intent, brands enhance content relevance and customer satisfaction. This approach drives conversions and builds brand loyalty.

This applies if you have...

- Goals to improve search engine visibility and rankings
- Challenges staying ahead of emerging search trends and content ideas
- Interest in creating content aligned with user intent
- Ongoing efforts optimizing keyword usage and content relevance

Potential benefits

- **Tailored user-centric content**
  Better address individual needs by analyzing user intent to enhance relevance and boost conversions.

- **Proactive trend alignment**
  Customize content to emerging user interests, resulting in higher search rankings.

- **Strategic keyword integration**
  Drive improved search visibility and organic traffic by ensuring content aligns with user specific search.

Global Transcreation for a Technology Company with Widespread Regional Operations

CHALLENGE

Marketers, copywriters, and translators supporting global brands invest significant time localizing copy for emails, websites, ads, and other media formats. Transcreation is often a complicated and time-consuming process due to coordination with local teams/agencies. Sometimes smaller markets can get “left out” and not receive local language versions of the marketing content (in which case they default to a foreign language campaign - usually English).

What if you could bypass this complexity and deliver hyper-localization that effectively drives your desired content outcomes around the globe?

Generative AI is rapidly evolving to better navigate cultural- and language-specific nuance, alleviate global stakeholder complexity, and give more markets access to more resonant local-market content.

SOLUTION

Leveraging Generative AI LLMs, marketing campaigns were transcreated across French, German, Japanese, and Portuguese. Transcreated text output was shared with language experts, along with the original copy and a localized copy created by agencies for comparison and feedback on tone and translation.

Emails, animated banners, and print ads were all tested, as well as the ability to input images, extract and translate text, and then re-compose the image in an editable format for designers or marketers to tweak. Output was deemed highly useful in expediting the transcreation process.

IMPACT

- Increased the speed of rolling-out local market campaigns
- Reduced agency fees and marketer time required for transcreation/localization
- Unlocked the ability to scale marketing campaigns to smaller markets (i.e., with AI, there is sufficient ROI to trans-create for small markets, that might otherwise have received English-language marketing)
Co-Branding and Partner Marketing for a Global Technology Company

**CHALLENGE**
Marketers and creative teams often collaborate via partnerships and co-branding to access a larger customer base. This leads to time consuming coordination across multiple content creation workflows to ensure compliance across brand guidelines and alignment between tone and other creative parameters.

**What if you could reduce coordination cycles across partners and agencies and more rapidly generate brand compliant content that seamlessly works across platforms and channels?**

Generative AI can accelerate marketer efficiencies by helping minimize partner barriers and generating collateral that drives co-branded campaign outcomes.

**SOLUTION**
Generative AI enabled the scaled creation of co-branded content that incorporates multi-brand needs while minimizing iteration between teams. Gen AI models were trained on each partner’s brand guidelines, creative parameters, campaign details, content and other inputs. From there, Gen AI digested the information and exported a variety of partner marketing collateral including blog posts, email marketing, and social posts, as stipulated by the marketer.

1. **Social Posts** – Partner marketing white paper text from PDF files were parsed using Python and different prompts and then fed to a tool to create short informative Tweets, headlines, a 1-paragraph write-up, and/or a short synopsis highlighting key takeaways

2. **Article Summary** – Long-form partner marketing content was fed into Gen AI LLMs to create summarized value propositions, competitive advantage statements, and an article summary, for activation across partner marketing channels

**IMPACT**
- Increased the speed of rolling-out co-branded campaigns and content
- Scaled campaigns to additional channels or markets given greater efficiency in content production
- Enabled more consistent messaging across content formats and enhanced brand equity
- Improved engagement, conversion, and customer outcomes
- Reduced agency fees and marketer time required to generate marketing campaigns aligned with co-branding guidelines
Proprietary Platform for Efficient, Global “No Touch” Ad Content Creation

CHALLENGE

On average 10% of ad design jobs are “complex,” requiring design from scratch and no reference visuals or copy. This content category takes on average 3x more handling time than lower complexity jobs (i.e., simple adaptations like adding borders or making changes based on guidance). As marketers and creative teams can be creating tens of thousands of new assets every quarter (across individual social ads, landing pages, search ads etc.), continuously producing fresh and engaging content while maintaining consistency across brand voice, channels, and platforms is a challenge.

What if you could jumpstart the creative process and scale content generation that automatically optimizes for personalized consumer needs?

Generative AI is quickly evolving to create net-new content at scale, enhancing creativity in complex ad creation and unlocking workflow efficiency.

SOLUTION

A custom-built Generative AI tool called on various relevant AI models to produce content which required minimal or no designer intervention. In the future, the next iteration of this tool can analyze briefs based on inputs and run business rules as needed.

1. Briefing and Setup – Marketer provided the creative brief into the tool and validated the brief
2. Content Production – Relevant AI models were accessed and the tool produced outputs that could be tweaked as needed by the marketer

IMPACT

- Unique outputs that have never been seen before
- Increased capacity by 2x for complex content creation, with a 48% reduction in average handle time
- Opened new opportunities for highly nuanced content such as in regulated industries (e.g., pharma, finance)
- Scaled messaging personalization across hyper targeted segments

1 - Based on internal Deloitte workflow studies
Introduction: Gen AI and Sales

Gen AI is revolutionizing the way sellers develop and nurture customer relationships by offering an unparalleled degree of personalization and self-serve capabilities that customers demand today.

With the ability to engage directly with customers early in their journey and produce tailored sales content along the way, Gen AI can serve as a powerful extension of the sales team. From chatbots that provide customers with real-time Q&A on products and services to self-serve, customizable quoting capabilities for partners, Gen AI can vastly accelerate sales cycle times and increase deal conversion.

In addition to unlocking new features, Gen AI optimizes the sales process by reducing administrative burden. This benefits sellers that are traditionally inundated with administrative tasks, such as updating CRM with meeting notes, finding proposal content, creating sales scripts, and drafting customer outreach emails.

### Key Potential Benefits for Sellers

- **Automate administrative and lower value tasks** such as updating CRM with meeting notes, finding proposal content, creating sales scripts, and drafting customer outreach emails.
- **Streamline the sales process at scale** leading to productivity gains, greater sales capacity, and lower cost to serve.
- ** Expedite training and onboarding** customized to an individual seller to further expand sales efficiencies with reduced learning and development costs and shortened sales ramp-up times.
- **Accelerate top line growth** by getting sellers in the market faster.
- **Align sellers to GTM priorities** with more equitable and personalized incentive plans, territories and quotas.

While Gen AI alone cannot address every unique aspect and complexity that arises throughout the sales process, it can serve as an integral collaborator and partner to the sales team. Gen AI’s advanced techniques in analyzing customer patterns and sentiments to tailor recommendations to customer needs equips sellers with the right content at the right time to make an impact. As sellers continue to refine and enhance recommendations, the accuracy and hyper-personalization can ultimately build trust for the end customer. Trust in the brand, trust in the solution, trust in the seller, and trust in the overall customer experience.

In this chapter we explore the following use cases: Seller Productivity, Sales Enablement, Customer Centric Offers, Intelligent Lead Generation / Prospecting, Personalized Sales Incentive Offers, and Sales Target Compensation and Communication.
Gen AI Capabilities and Use Cases for Sales

B2B buyers are demanding elevated, B2C-like purchase experiences. Gen AI can increase seller productivity / speed and reduce experience friction.

**What AI Can Do For:**
- Improved customer experience
- Better self-serve capabilities
- Higher satisfaction
- Reduced time spent in admin tasks
- More relevant sales outreach / comms
- Improved, faster adoption of products / services
- Improved seller productivity
- Higher initial buy conversion rates
- Improved cross-sell and retention rates
- Greater competitive advantage
- Maximized sales earnings with personalized plans
- Greater satisfaction and motivation due to transparent compensation rationale

**CUSTOMER CROSS JOURNEY POTENTIAL BENEFITS**
- Improved customer experience
- Better self-serve capabilities
- Higher satisfaction

**SELLER CROSS JOURNEY POTENTIAL BENEFITS**
- Higher initial buy conversion rates
- Improved cross-sell and retention rates
- Greater competitive advantage

**CUSTOMER ACTIVATION**
Personalize customer activation through tailored plans, hyper individualized journeys, next best action recommendations, conversational intelligence, and strategies to mitigate leakage.

**TOP FUNNEL AUTOMATION**
Automate prospecting and engagement, including automation of segmentation, profiling, prompts, meeting outlines and minutes, pitch content, and emails.

**DATA ANALYSIS AND INSIGHTS**
Use Gen AI to analyze customer and sales data to develop customer segmentations, personalized sales target forecasts, optimized territory and quota assignments.

**INCENTIVIZE AND MOTIVATE**
Leverage Gen AI to create personalized incentive strategies and compensation plans and conduct real-time sales performance analysis.

**SUPPORT AND RESOLVE**
Use Gen AI to generate personalized messaging and self-service to sellers to resolve crediting and compensation inquiries that are deal specific during the pay cycles.

**USE**
- Curate self-serve training based on purchases
- Curate adoption / change mgmt. plan and comms
- Visual quoting with blueprint/architecture diagram generation
- Automate value realization and ramp reporting

**OPTIMIZE SUPPORT**
Automate service delivery and issue prevention; track usage against sold capacity and terms, and translate predictive analytics on usage into recommended actions.

**SALES PLANNING ACTIVITIES OCCUR PERIODICALLY (QUARTERLY, SEMI-ANNUALLY etc.) TO REALIGN SELLERS TO GTM PRIORITIES**

**SALES PLANNING**

**INCENTIVIZE AND MOTIVATE**
Leverage Gen AI to create personalized incentive strategies and compensation plans and conduct real-time sales performance analysis.

**OPTIMIZE SUPPORT**
Automate service delivery and issue prevention; track usage against sold capacity and terms, and translate predictive analytics on usage into recommended actions.

**EASE OF CONTINUED BUSINESS**
Automate renewals lifecycle, including generation of quotes. Generate predictions and hints to upsell, generate proposals, and next best actions.

**MANAGE**
- Recommend ways to optimize usage of products / solutions
- Power chatbots / digital assistants; escalate issues to live support as needed
- Create troubleshooting guides for incident and maintenance related issues

**EXPAND / RENEW**
- Generate personalized / optimized renewal offers
- Generate future state roadmap and outlook reports

**PRE-SALES PERSONALIZATION**
Personalize presales activities by optimizing solutions, quotes, and proposals, and contract terms based on customer profile, interactions, and compliance factors.

**ADOPT AND LAND**
Enable change and adoption by providing prompt-based sales performance reporting, automating customer follow ups, and personalizing value realization and account plans.

**USE**
- Curate self-serve training based on purchases
- Curate adoption / change mgmt. plan and comms
- Visual quoting with blueprint/architecture diagram generation
- Automate value realization and ramp reporting

**MANAGE**
- Recommend ways to optimize usage of products / solutions
- Power chatbots / digital assistants; escalate issues to live support as needed
- Create troubleshooting guides for incident and maintenance related issues

**SALES PLANNING ACTIVITIES OCCUR PERIODICALLY (QUARTERLY, SEMI-ANNUALLY etc.) TO REALIGN SELLERS TO GTM PRIORITIES**

**EASE OF CONTINUED BUSINESS**
Automate renewals lifecycle, including generation of quotes. Generate predictions and hints to upsell, generate proposals, and next best actions.

**VALUE PROVIDED**
- Maximized sales earnings with personalized plans
- Greater satisfaction and motivation due to transparent compensation rationale
- Optimized seller performance and coverage to increase productivity
- Better incentives, lower attrition and improved understanding of compensation alignment to GTM priorities
Seller Productivity

From Administrative to Strategic: Enabling Productivity and Personalization with Gen AI

Gen AI can fuel faster, more effective deal cycles from initial inquiry through deal close, by translating customer insights into tailored responses. It enables interactive customer Q&A and personalized communications and content across channels - all of which free sellers to focus on priority selling activities.

Issues and opportunities

Customers increasingly expect tailored buying experiences, including human-like interactions, while they are conducting their own discovery research and rich, relevant content during subsequent exchanges.

Such personalization requires extensive seller effort (e.g., customizing outreach, preparing for meetings, analyzing behavioral insights, logging data in CRM, building pitch content), straining seller productivity and deal velocity.

Gen AI can help shift seller focus from admin tasks to more strategic sales focused tasks by automating highly manual activities for sellers.

How Gen AI can help

1. **Auto-update CRM:** AI and ML continually update the CRM tool to maintain pipeline hygiene, significantly offloading administrative burden from sellers

2. **Smarter actions prompts:** Gen AI parses diverse mktg., sales, and customer data at scale to present the right action / content to the customer instantly, dynamically creating a personalized, effective journey

3. **Effective sales content generation:** In real-time, Gen AI accurately analyzes past successful interactions, trends, and prospect data to help inbound and outbound reps build rich new content that is tailored to a specific customer’s product / service needs

4. **Seller capacity maximization:** Gen AI accelerates sequences with voice-to-text capabilities (e.g., transcribe meetings, summarize calls, take actions, propose calendar invites) that offload admin work so sellers can focus on selling

This applies if you have...

- Slow-moving or abandoned leads
- Limited sales team capacity
- High cost of sales
- Decentralized / ineffective sales pitch content

Potential benefits

**Improved seller productivity**

Automation of admin work and insight-based action prompts throughout the deal cycle helps sellers focus on highest-value selling tasks

**Enhanced customer relevance**

Providing customers with rich, relevant content - with or w/o a seller engaged - supports overall customer satisfaction

**Strengthened brand**

Automate the balance of deep personalization per customer with brand-consistent tone and style
Sales Enablement

Fit-for-Purpose: Dynamic Enablement and Alignment Across the Sales Motion

Gen AI amplifies sales enablement efforts by using customer sentiments to produce elevated customer interactions. It can decrease sales ramp-up time and boost sales performance with tailored training, onboarding, and coaching.

Issues and opportunities

In cost efficiency-focused and resource-constrained environments, sales teams are expected to do more with less. Organizations often maintain low coverage ratios of enablement to sales, requiring sales teams to work overtime to serve their various audiences.

Enablement teams are pressured to revamp offerings and provide real-time content at key points in the customer journey. At the same time, sellers and customers seek more user-centric, self-serve content to learn about products and tactics to drive growth.

Sales managers struggle to proactively provide point-in-time feedback and address seller performance based on unique seller needs, capabilities, and demographics.

Gen AI enables organizations to shift from standardized to dynamic enablement that is fit-for-purpose of the seller’s role and sales motion.

How Gen AI can help

1. Tailor onboarding: Custom-build rich, personalized training content relevant to a seller’s role, level, segment, product coverage, learning preferences, etc. to decrease ramp-up time and drive adoption
2. Accelerate training development and delivery: Rapidly develop sales content, trainings, and certification program content, and enable sales to ask a ChatGPT-like training bot technical questions on course content
3. Produce dynamic sales coaching: Analyze seller actions data and trends in real-time to generate actionable insights for sellers along with targeted strategies, prompts, tips, sales techniques delivered through for example videos, articles that is fit-for-purpose for the seller

This applies if you have...

- Limited sales enablement team capacity
- Large sales force required to drive revenue growth
- Weak sales training or reduced management layers

Potential benefits

- Enhanced customer experience
  - Interpret customer conversations, sentiments, and data to improve recommendations and engagement
- Expedited training and onboarding
  - Aid sales self-learning with user-centric approaches to deliver relevant content, meeting audiences where they are / how they learn best
- Empowered sales managers / leaders
  - Managers gain insights on performance / behavioral patterns via AI-transcribed data, so they can offer customized feedback and support to grow skills
Customer-Centric Offers

Holistic Quoting and Contracting: Offering Dynamic and Hyper Personalized Solutions

Gen AI improves customer-centricity of offers by shifting focus from products to holistic solution-based quoting and contracting and, in turn, can eliminate long lead times in the process and increase customer satisfaction.

Issues and opportunities

Traditional quoting and contracting processes and tools address customers’ basic product needs while overlooking broader business and/or technical problems they seek to solve holistically, driving protracted negotiations and contracting cycles.

Such traditional solutions are cumbersome, costly to maintain, and built around pre-defined rules.

Sellers need support to dynamically generate recommendations tied to customer account strategies and lifecycle that is relevant to each customer’s unique needs.

Gen AI enables a shift to more customer-centric and customer problem and solution-based offers that truly meet the needs of the customer.

How Gen AI can help

1. **Produce visual quotes**: Gen AI enables users to visually configure or customize solutions (e.g., architectural diagram for software or blueprints for industrial products) which overlay products with existing technical/product landscape of customers.

2. **Enable customer self-serve quoting**: Gen AI responds to customers’ text inputs (describing their issues, use cases, etc.) in real-time, generating quotes with product configurations and pricing tailored to address their specific needs.

3. **Customer-centric contracting**: Gen AI analyzes past customer contracts, performance, and engagement to make dynamic, optimized recommendations for any journey (purchase, add-on, renew, etc.), rather than relying on static, pre-defined rules.

This applies if you have...

- Long quoting / contracting lead times
- Increasing customer churn
- Customers switching products frequently
- Cumbersome and costly Configure, Price, Quote (CPQ) processes and systems

Potential benefits

**Enhanced customer-centricity**

Self-serve offer creation based on a customer’s needs helps provide true solutions vs. products, improving their satisfaction.

**Improved customer retention**

Ability to provide offers relevant to customer problems throughout their lifecycle improves overall ‘stickiness’ and reduces churn.

**Process efficiency**

More personalized, accurate offers can cut down negotiation cycles, expediting quoting and contracting processes and reducing cost-to-serve.
Intelligent Lead Generation and Prospecting

Lead Generation Accelerated: Introducing Precision to Targeting Strategies

Gen AI accelerates lead identification and effective targeting by automating customer segmentation, analyzing customer data, building and adapting ideal customer profiles (ICPs) based on prospect behaviors, and navigating sellers to higher-quality prospects to boost win rates.

Issues and opportunities

Sellers often struggle to adjust targeting strategies as buyer behaviors and preferences evolve. They rely on trial and error with disjointed tools and data to understand targets’ hierarchical structures, identify Sales Champions, and stay current on market and customer shifts and business needs.

Tracking sales interactions across channels adds more complexity and risks sellers using outdated info. This can drive proliferation of unqualified leads, extended lead times, and wasted sales effort, and suboptimal buyer engagement. Meanwhile, customers increasingly expect tailored experiences across their desired platforms, including human-like interactions during discovery.

Gen AI enables improved understanding of buyers through self-serve capabilities and profiling, supporting improved prioritization of lead engagement.

How Gen AI can help

1. **Buyer profile building**: Gen AI can analyze CRM and other data and identify patterns (industry, location, size, job titles) and preferences to build detailed buyer profiles that help sellers understand their needs and tailor outreach accordingly.

2. **Lead prioritization**: Gen AI can analyze range of customer interactions (e.g., call transcripts, emails) to assess customer sentiment and predict propensity to buy, enabling smarter lead prioritization so sellers can spend time most effectively.

3. **Power chatbots**: Gen AI enables a human-like Q&A experience for customers seeking instant, no-pressure responses tailored to their exploratory queries, before engaging a seller. Prospects misaligned with target profiles can be weeded out.

4. **Seller co-pilot**: Gen AI can learn specific customer personas, communication styles, and common objectives to tailor recommendations / prompts to sellers based on deal stage.

This applies if you have...

- Lead proliferation / junk leads
- Low lead conversion rate
- High cost of customer acquisition
- High cost of profiling tools and licenses

Potential benefits

- **Precision in targeting**: Continually-refined segments help ensure leads recommended to sellers align to their value prop, and cut risk of outreach to dated or irrelevant contacts.

- **Improved lead conversion rate**: Prioritizing pursuits with higher chance of purchase generates healthier leads which can qualify and convert faster.

- **Optimized resource allocation**: Reps focus on leads that align with the company’s ideal customer profile, maximizing the impact of their efforts.
Personalized Sales Incentive Offers

Individualized Incentives: Personalize Comp Plans to Individual Motivations

Compensation Plans are often supplemented with special incentives for the sales force (SPIFFs), such as gifts, cash, trips, etc., and are used to motivate sellers achieve specific goals. Gen AI can be used to help create targeted salesperson incentives that are personalized to specific opportunities for an individual seller.

Issues and opportunities

In general, Sales Compensation Plans are setup and revisited once a year with a known strategic objective that is driven based off the organization’s annual growth plan. These compensation plans are typically designed to maximize motivation while minimizing the number of plans to administer and minimizing the complexity, so sales reps can better understand what is required to achieve objectives and how they are getting paid.

However, these incentives are also generic in nature – across the broadest set of sellers possible to minimize overhead. Creating and managing plans that are personalized – targeted directly at what would motivate the seller the most, and what specific opportunities would add the most value to the organization within that specific seller’s influence, is nearly impossible to operate at scale manually.

How Gen AI can help

1. **Personalized incentives**: AI can learn from historic sales and run an analysis on various customer cohorts, including current market conditions and competitor data to identify products and services that are most likely to gain traction within each cohort. It can also learn from the outcomes of different personalized compensation strategies and continuously refine its suggestions based on actual sales results and seller performance. This feedback loop enhances the accuracy of future recommendations, improving seller behavior and driving additional revenue for the organization.

2. **Communication and transparency**: Gen AI can create explanations to communicate the rational, structure, and payment terms behind compensation plans and decision to sales teams, enhancing transparency and understanding.

3. **Personalized incentive tracker**: Gen AI can generate personalized communications to sellers communicating their progress and encouraging them to execute on sales to achieve their highest potential earnings.

This applies if you have...

- Generic sales compensation plans
- Unmotivated sales reps

Potential benefits

**Trust and Transparency**

Personalized sales and incentive offers can build trust and transparency in commission programs.

**Increased Motivation**

Motivated sales teams leads to better sales conversion and additional revenue.

**Strategic Alignment**

Personalized incentives align behaviors to sales strategy through customized plans aligned to customer cohorts and individual sellers.
Sales Target and Compensation Communication

Strategic Compensation: Aligning Sales Behaviors to GTM Strategy and Priorities via Compensation Clarity

Gen AI can help reps to better understand their assignments, quota targets, and compensation plans and how they align to a company’s strategic goals. It can also help to resolve and answer any crediting and compensation inquiries.

Issues and opportunities

It generally takes organizations until after the start of the performance year to distribute quota letters and comp plans to sales reps, which leaves reps in a state of ambiguity as to what exactly they should be selling, where and how they are going to get paid.

When quota letters and comp plans are communicated, Sales Ops often gets inundated with inquiries about their assignments and nuances of how they will get paid. Rep confusion about compensation plans and crediting leads to less time selling in the market and more time spent on administrative tasks.

Lack of effective understanding of compensation plans can lead to selling that is misaligned to the company strategy.

How Gen AI can help

1. **Timely communication of territories, sales targets, and compensation plans**: Generative AI can aid in quickly creating communications for reps to best understand their account assignments, quota targets, and compensation plans and how they align with company strategic goals.

2. **Compensation plan comprehension**: Gen AI can help answer any questions that reps may have about their assignments or plans so that the rep fully understands their selling responsibility, how they will be paid, and the underlying strategy.

3. **Crediting inquiries**: Gen AI can be used to answer any questions a rep has around their crediting and compensation on specific deals. This can alleviate confusion and mistrust that a rep has about how or why they are receiving a specific compensation amount and enable Sales Ops to continue to focus on company strategic objectives.

This applies if you have...

- High volume of compensation plan inquiries
- Low sales rep satisfaction scores

Potential benefits

- **Improved rep satisfaction** by eliminating confusion on account assignments and compensation plans
- **Improved time to market** by more quickly communicating assignments and plans to reps
- **Reduced time of response** on inquiries on crediting and compensation
Task Automation to Boost Sales Productivity

CHALLENGE

Sellers allocate significant time to administrative tasks such as building outreach strategies, pitch decks, account strategies, and quarterly business reviews, which takes away from revenue generating activities with customers.

Further adding to sellers’ plates is the increase in customer expectations for tailored buying experiences. Often this requires additional time spent on strategizing, planning and crafting win themes, follow-up outreach, etc.

Such administrative tasks can lead to longer deal cycles, missed opportunities, and hindered customer experience.

What if you could drastically reduce the administrative burden on your sales teams?

SOLUTION

Applying Gen AI accelerated sales efficiencies by enabling analysis of structured customer performance and demographic data (such as past sales, segment, profile) and unstructured data (such as voice and sentiment) at scale using Natural Language Processing (NLP) powered AI.

This Gen AI solution can then turn analysis into meaningful outreach actions (e.g., meeting, email, call) and content recommendations (e.g., auto-generating personalized pitch decks, outreach emails, call scripts).

Additionally, coupled with other AI tools, this solution can proactively update CRM pipeline, tasks, lead status, etc. to further cut administrative burden.

IMPACT

- Improved sales productivity, by offloading seller admin tasks to Gen AI solutions and automation
- Enabled better customer experiences by more relevant and customer centric outreach
- Reduced cost-to-serve from reduced interaction cycles and overall shorter sales cycles
Sales Enablement at Enterprise Scale

**CHALLENGE**

Sales teams are increasingly asked to do more with the same (or potentially less) resourcing – particularly in business environments that are cost efficiency-focused or resource-constrained. Such organizations may also deploy lower sales enablement coverage, at the same time sellers seek enhanced support with meaningful content and training throughout sales cycles.

This increased expectation of sales enablement coverage paired with fewer allocated resources risks overburdening employees and eventual sales performance deterioration.

Sales management layers may be similarly constrained, further impacting sellers’ ability to find and utilize materials and support they need.

*What if personalized sales enablement tools were at the fingertips of all sellers within your organization?*

**SOLUTION**

Gen AI enabled sales managers to harness insights at scale with the power of voice and text analytics. This technology can ‘listen’ to sales interactions (calls, emails, etc.) and identify patterns to understand successful outcomes and potential skill gaps for individual sellers. This data is used to auto-generate actionable insights on sales force needs for enablement leads and sales managers. Managers can shift from static training materials to targeted performance strategies based on a seller’s needs, role, level, product coverage, learning preferences, etc.

Further, Gen AI can support accelerated creation and delivery of training content, including product and/or technical learning. Gen AI can power interfaces for sellers to ask a ChatGPT-like training bot technical questions on course content.

**IMPACT**

- Expedited onboarding of new sellers who can self-serve the right content at the right time, thereby trimming onboarding cost and ramp-up cycle to produce sales sooner
- Augmented sales management layers that can do more with less, using insights on team and individual performance to provide customized coaching, as well as share best practices across teams
Territory Assignment, Quota Setting and Commission Planning Strategy at a Global Investment Bank

**CHALLENGE**

In today’s market, sales compensation programs for thousands of sellers across organizations are built on systems that are nearing obsolescence with inconsistent governance, processes, tools and analysis to proactively and efficiently review compensation strategy.

Legacy system capabilities and designs make it more difficult to implement strategic changes in target setting processes. The inevitable result is a manual quota process yielding to delays.

A gap between the understanding of quota planners and the quota setting philosophies of an organization can lead to inaccuracies and ultimately wider than desired standard deviation of performance.

*What if the quota setting systems were enabled with Gen AI tools and consistent quota planning is automated at scale?*

**SOLUTION**

A Global Investment Banking firm introduced new AI-enabled cloud platforms to improve their internal sales compensation program capabilities. The platform integrated compensation assessments, external policy and governance benchmarks, and internal quota workflow functionality to steer sales ops with real-time target setting scenario planning and commission forecasts.

Sales reps were provided with intuitive and transparent reports along with capabilities to deduce earnings all the way to sales made.

The solution was a modernized commission system, along with quota analytics capabilities (enhanced through AI) to suggest optimized territory assignments and targets for sales ops to reference.

**IMPACT**

- Informed and improved decision making based on expedited target setting scenario planning with a clear analysis comparison on various scenarios. More realistic targets set by using the AI capabilities leading to better performance and motivated sales reps
- Produced transparent and intuitive reports for sales reps with capabilities to deduce incentive calculations thereby gaining sales reps’ trust and aligning them with company’s strategy
- Minimized the manual effort of tracking and maintaining edge cases in different versions, thus reducing the time to roll out targets
Functional Domain Deep Dive

Commerce 04
Introduction: Gen AI and Commerce

Generative AI has the potential to revolutionize both the product search process and supply chain coordination.

In the B2C space, Gen AI-based product search can support hyper personalization and tailored recommendations. Retailers can provide their customers with new ways to search for products, such as using images, voice or video to make searches more effective. Additionally, Gen AI can enable packaged search results in an extremely detailed, relevant and personalized manner.

In the B2B space, Gen AI has the potential to develop buying plan solutions for procurement/corporate buyers. Such solutions would analyze a variety of internal inputs (e.g., previous orders, supply chain issues, warranty expirations) and external data (e.g., market conditions, business news about partners, etc.) to develop highly customized, optimal buying plans which could be reviewed with the appropriate buyers.

KEY POTENTIAL BENEFITS FOR COMMERCE

- Enable hyper-personalized search and product recommendations by helping customers find products and services via multiple media channels across audio, video, and images.
- Foster valuable partnerships through cross merchandizing and cross selling opportunities with partners who offer complementary products.
- Optimize partner relationships by aggregating data to forecast both near and long-term purchasing needs.
- Enhance customizations of commerce solutions by using Gen AI code assist tools and test automation capabilities, thereby continuously enhancing digital commerce channels and delivering new capabilities faster to market.

With Gen AI’s impacts on both customer and business interactions, it has the potential to revolutionize the Digital Commerce space. To fully take advantage of the opportunities unlocked by Gen AI, it is important to consider the unique needs and implications around engaging with both B2B and B2C stakeholders.

One key consideration pertains to data inputs. For B2B the focus may be on protecting proprietary data, whereas in a B2C setting ensuring customer privacy might be most important. Regardless of the setting, approaching Gen AI opportunities with the end-to-end lifecycle in mind can help to ensure no considerations are left unexplored.

In this chapter we explore the following use cases: Shopping Experience, Search Expansion, Trend Analysis, Product Information Management.
Gen AI Capabilities and Use Cases for Commerce

Whether B2C or B2B, Generative AI gives companies an opportunity to rethink search and cart expansion.

**What AI Can Do For:**

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<thead>
<tr>
<th>DISCOVER</th>
<th>EVALUATE / TRY</th>
<th>BUY</th>
<th>ONBOARD / USE</th>
<th>MANAGE</th>
<th>EXPAND / RENEW</th>
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<tbody>
<tr>
<td>Intelligent Search using images, audio and video</td>
<td>Personalized Recommendations, updated based upon evaluations</td>
<td></td>
<td>Track use and feedback</td>
<td>Track issues to original recommendations</td>
<td>Personalized Follow-ups</td>
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<td>Add-on repurchase recommendations</td>
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**Augment Test Automation**

**Code Generation**

**CUSTOMER PROFILING**
Create immediate and long-term buying plans based upon a customer demographics and behaviors.

**SALES EXPANSION**
Explore and generate offers with new partnerships to increase sales.

**CONTINUOUS LEARNING**
Train Large Language Models (LLMs) to learn product catalog and customer preferences based on continuous purchase behaviors and Gen AI feedback loops.

**CUSTOMER CROSS JOURNEY POTENTIAL BENEFITS**
- Improved customer experience
- Improved self-serve capabilities
- More intelligent and better fit re-purchase recommendations

**COMPANY CROSS JOURNEY POTENTIAL BENEFITS**
- Increased competitive opportunity
- Improved cart size
- Improved win rate
- Continuous learning about customers
- Improved post-purchase recommendations and service
Streamlined Shopping Experience

Retail customer: Streamlining and enhancing sales

Gen AI allows customers to conduct more than a simple search. They can upload pictures of an outfit and have Gen AI provide ideas on how to accessorize their ensemble to improve overall customer engagement through meaningful personalization.

Issues and opportunities

In the apparel space, customers must know what they’re looking for and search for each item individually.

Conventional searches are time-consuming and often lack knowledge of a specific consumer’s needs since they are built with generic customer profile(s) in mind.

The introduction of AI-generated content brings about a transformative shift. These solutions are designed to not only facilitate the sale of isolated products but also to curate and recommend a diverse array of items that align with a customer’s preferences and requirements.

How Gen AI can help

1. **Intuitive search**: Upload a photo of the outfit in question. Customer can even use their camera to take a selfie wearing the outfit. Add keywords on what you are looking for from a style, color or other requirements.

2. **Personalized recommendations**: Generative AI can create an updated photo with additional items showing how the new ensemble will look. The list could include jewelry, additional clothing (sweater, scarves, socks), shoes.

3. **Streamlined shopping experience**: Once the customer decides they like the image generated, Generative AI develop a “shopping list” for the customer. The customer can deselect items the already have.

4. **Enhanced feedback loop**: Customer should have the ability to provide feedback on recommendations (like/dislike). The Generative AI tool can then refine the recommendations; create an updated photo of the proposed outfit. This step can be repeated as the customer and tool refine the search.

This applies if you have...

- Low conversion rates from browsing to actual purchase
- Increasing browsing time with no purchase
- Decreasing customer satisfaction

Potential benefits

1. **Improved customer engagement**
   Delivers product recommendations that resonates with what the customer is looking for and results in deeper connections and more meaningful interactions.

2. **Personalization at scale**
   Better tailored recommendations to individual preferences to foster stronger connections and drive improved engagement.

3. **Efficiency and time savings**
   Free customers from time-consuming manual searches and unlock higher cart values.

Gen AI allows customers to conduct more than a simple search. They can upload pictures of an outfit and have Gen AI provide ideas on how to accessorize their ensemble to improve overall customer engagement through meaningful personalization.
Hyper-Personalized Search Results

Search Functions Optimized: Leveraging Natural Conversation and Gen AI to Enrich Search Results

Generative AI has the potential to improve searches for products and services through pattern recognition and natural language queries for improved search results and personalized offers.

Issues and opportunities

Search functionalities can be static in nature and optimized for general customer needs vs. personalized needs leading to sub-optimal responses to customers.

Generative AI has real potential to optimize the customer experience. In particular, it has the capacity to mimic natural conversations, and provide customers with an enriched experience. B2B ecommerce brands can leverage Gen AI-search to address complex and technical queries, provide extensive context and explanation on product use, generate tailored response of video, audio and text form-fitted to the device, user type and type of query.

How Gen AI can help

1. **Intuitive and personalized search**: Customers can search for the product as a natural conversation, describing the usage of product in your business with a certain characteristics, and Generative AI can look for patterns in your search to generate product search result / recommendations that meets the true need of the customer.

2. **Natural Language based search**: For example, customers could say that ‘I own an agriculture farm and want to increase crop nutrition and need fertilizer that would have two common primary nutrients and has relatively high nutrient content. Please suggest products I should buy.’ Generative AI can convert this natural language into a query and find the result which changes the complex search for a large variety of B2B industry products and significantly simplifies product discovery.

This applies if you have...

- Sub-optimal search results and feedback
- Decreasing purchase conversion

Potential benefits

- **Targeted recommendation**
  Deliver search results and recommendations that meet the customer’s true needs vs. needs of generic customer profiles

- **Personalization at scale**
  Better tailored recommendations to individual preferences to foster stronger connections and drive personalization for customers

- **Efficiency and time savings**
  Customers can save time in searching for products and more time actually using the products
Optimized Purchase Plans

Bespoke Buying Plans: Generating Meaningful Insights with Complex Algorithms

Gen AI enables mining and analysis of a wide combination of data of B2B customer data such as product sales, warranty expirations, supply chain data, external news data to inform organizational strategies and improve sales.

Issues and opportunities

Data warehouses have made it easy for companies to store data on their customers. In the B2B space, having the data and being able to act on the data are two different things. There are challenges in analyzing large data sets with numeric and language-based data and combining the analysis into meaningful insights.

Gen AI can mine the data based upon B2B relationships; and generate a recommended buying plan that shows immediate needs and long-term plans. Providing B2B customers buying plans can help reduce the time of their buyers, making B2B customers more efficient. The plans can be refined as the buyers provide feedback on the suggested plans.

How Gen AI can help

1. Planning and forecasting optimization: Gen AI enables companies to update their buying plan whenever a B2B partner is in the news. For example, a news article about their expansion could lead to an updated buying plan showing they need more of a product.

2. Sales expansion: Using B2B order data compared to other partners and analyzing patterns can lead to additional product recommendations advance

3. Customer satisfaction and retention: Optimizing purchasing plans, can drive improve on-hand product availability (downstream), improved pricing and enhanced customer satisfaction

This applies if you have...

- Difficulty in analyzing patterns based on numeric and natural language insights

Potential benefits

- Improved experience
  - Help improve B2B parent experience by understanding their needs more accurately

- Improved quality
  - Get in front of quality issues and have solutions ready before partners call

- Increased sales
  - Drive sales using advanced recommendations based upon orders across all partners
Dynamic Product Information Management

PIM Process Streamlined: Automatically Generated Product Descriptions for Customers

*Gen AI has the potential to accelerate and improve PIM processes by generating product descriptions, information, pictures and improving time to market.*

**Issues and opportunities**

Generating text and content for your product catalog can be a time-consuming process requiring a lot of manual effort by different teams. Writing product copy and the associated Product Information Management (PIM) data can be time consuming.

Generative AI can speed this up. Product descriptions, product typing, searchable tags, and many other product attributes can be written by Generative AI from a single image. This can speed up the PIM process and get your products in the hands of your customers sooner.

How Gen AI can help

1. **Improved product findability:** Gen AI can create a product description and other attributes of your product from a photo.

2. **Themed catalog and product information:** Whether for a particular catalog or all your products, Gen AI can write the product descriptions with a theme, making sure the details are consistent across your product portfolio.

3. **Enhanced, dynamic product visualization:** Soon, Gen can generate 3D images from a single photo. This capability can augment the photos you have online for your product catalog.

This applies if you have...

- Long or increasing time to market for new products
- High cost of PIM processes

Potential benefits

- **Faster time to market**
  Streamline the product development process and improve overall new product launch timelines

- **Improved quality**
  Consistency across product catalog data can be improved using the same process across your products

- **Efficiency and time savings**
  Reduced manual tasks in PIM process
NextGen Shopping Experience for Industry Leading Grocers

**CHALLENGE**

The combination of ever-expanding customer expectations, new entrants, and long-time rivals have made an already competitive grocery industry even more intense. As a result, grocery chains are looking for ways to differentiate themselves in the eyes of their customers.

During June and July of 2023, Deloitte surveyed 100 senior executives from US grocery retailers with over 10,000 employees about the future of their industry.1 What we found out is that optimism is growing among industry insiders around the financial benefits of Gen AI, with 40% expecting revenue growth or cost savings. Although 49% believe it’s premature to predict, and a few 11% are pessimistic. A substantial portion (over 40%) of surveyed executives anticipate using Gen AI in their businesses by 2024.

*How might these grocery retailers find new competitive advantages through Gen AI?*

**SOLUTION**

A promising Gen AI application is a “customer assistant,” encompassing customer service, meal planning, creating shopping lists for those meal plans, searching for alternatives, and proactively alerting the customers about the items on sale from their shopping list.

This automated assistant can capture a customer’s shopping details (e.g., shopping for a week for a family of four with two teenagers who need to eat healthier) and leverage Gen AI to develop a list of main dishes plus side items that pair well; the assistant can also incorporate user feedback to improve recommendations over time.

As the recommendations improve so would the grocer’s understanding of customer behavior and trends. This would improve forecasts and increase supply chain efficiencies and make empty shelves a thing of the past.

**IMPACT**

- Increased customer loyalty and sales
- Unlocked opportunities for cross merchandising and cross promotions
- Improved product planning based upon evaluation customer interactions
- Advanced and efficient forecasting accurately predict demand and prevent food waste

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1. The future of grocery retail, June and July 2023

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Sources: 1. The future of grocery retail, June and July 2023
AI-enabled Product Assortment Planning in Manufacturing

### Challenge

The significant growth in e-commerce in recent years has forced traditional supply chains to evolve to meet demand. Evolving supply chains have increased complexity and promoted the adoption of end-to-end solutions. For example, to increase sales traditional B2B manufacturers are taking a B2B2C perspective when demand forecasting and approaching their distributors.

A key to this approach is to increase buyer confidence when adopting digital channels. Assisting buyers in determining optimal order quantities and guiding them to make choices aligned with production levels can significantly contribute to buyers' growing confidence in digital channels.

**What if Gen AI could be leveraged to improve buyer decision making and as a result improve their confidence in digital retail?**

### Solution

To improve accuracy and confidence in digital channels, a manufacturer transformed their B2B commerce website for their retail partners and mapped out architecturally significant customer use cases. The solution included the enterprise application architecture, architectural decisions, and the capability map, centered around the Salesforce platform, leveraging Einstein as the AI Brain for intent recognition, and other backend applications through an API gateway.

Additionally, the solution integrated data that was procured externally on the retail partner's demographics which helped recommend the correct product assortment. Gen AI tools helped with the language and tone of the messages displayed to retailers explaining the reasoning behind the recommendations.

### Impact

- The Salesforce enabled transformation helped to identify the retailers with the products to buy through the distributor website helping with a 7% increase in sales.
- Improved sales for the manufacturers by capturing the lost revenue about ~4% lift.
- Help better forecasting of the inventory which helped to meet 95% ATP.
Functional Domain Deep Dive

Service 05
Introduction: Gen AI and Service

Service organizations are being transformed with use of Gen AI through self-service bots and personalized service interaction.

As customers increasingly have the power to control their experiences and tailor products and services to meet their needs, service remains a critical area where a customer need must be met efficiently and effectively by organizations. For years, companies have attempted to leverage bots and self-service solutions to help customers, yet many of those customers have grown frustrated at the limitations of the technology without solving long-wait times, having to repeat themselves or multiple redirects to get answers to their problems.

This leaves a dissatisfied customer base and an employee population is stretched too thin to handle all service issues adequately, but the possibilities offered by Generative AI can allow customers to be better served, employee capacity to be unleashed, and employee satisfaction to be boosted.

**KEY POTENTIAL BENEFITS FOR SERVICE**

- **Faster customer issues resolution** from accurate self-service capabilities and fewer redirects and targeted service in case of live-help
- **Fit-for-purpose outreach** to customers that is personalized and customer centric to the issue at hand
- **Improved agent productivity** through targeted scripts, prompts and training leading to improved resolution time and automated follow-up emails
- **Improved cross-sell** recommendations from better understanding of the customer needs holistically

The increase in quality of chat bots and self-serve solutions can minimize the need to engage one-on-one with an agent, while those who actually do need to speak to someone can be triaged to the right agent that can solve their needs with the first conversation.

As a service agent, these self-service solutions unlock capacity for more strategic and valuable work, as well as more focused time and effort when engaging one-on-one and subsequently increase agent satisfaction.

This combination of helping customers solve their issues and boosting employee satisfaction is an effective use of Generative AI, and one that organizations are already starting to leverage.

In this chapter we explore the following use cases: Time to Resolution, and Agent Assist.
Gen AI Capabilities and Use Cases for Service

Gen AI can be layered into the existing customer journey to improve customer and employee experience, and drive efficiency.

What AI Can Do For:

- Personalized service outreach communication (emails, calls)
- Fit-for-purpose and hyper-customized service experiences
- Improved resolution speed based on improved understanding of issues

What AI Can Do For:

- Improved agent productivity
- Increased cross-sell
- Reduced cost-to-serve through automation
- Improved agent satisfaction and learning

CUSTOMER CROSS JOURNEY POTENTIAL BENEFITS

- Improved and accurate resolution based on conversation and queries
- Personalized follow-up communications
- Improved agent satisfaction and learning

AGENT CROSS JOURNEY POTENTIAL BENEFITS

- Customized and accurate resolution based on conversation and queries
- Personalized offers based on service interactions
- Improved agent satisfaction and learning

Before the Conversation

OUTBOUND MESSAGING

Identify customers to send communications about service
Send auto-generated personalized email at moments that matter based on analysis of past interactions and customer data

CUSTOMER ANALYSIS

Parse customer reviews and testimonials to highlight positive experiences to personalize and automate outbound messaging

INITIAL CONTACT IN SELF SERVICE

Engage conversational AI via web, app, or chat to support self-service resolution and increase deflection
Receive automated chatbot responses to requests and queries
Provide self-service, and personalized responses to complex customer inquiries regardless of language or location through conversational AI
Online search capabilities for low complexity intents
Leverage fraud detection in self-service channels

VOICE

Escalate to the voice channel for live problem solving beyond the self-service channel capabilities or due to caller preference and intent
Continue the discussion with live agent without repeating reason for call

CONTACT RESOLUTION

Improved and accurate resolution based on conversation and queries

POST INTERACTION EXPERIENCE

Personalized follow-up communications
Personalized offers based on service interactions

After the Conversation

POST-SERVICE OPTIMIZATION

Produce automated and personalized post-service follow-up communication, capture and summarize customer behavior and insights and extract intent and produce automatic knowledge articles based on successful resolution for future use

Voice to Action

Understand customer conversations and utilize smart routing to route to best agent available via voice channel; transcribe conversations from self-service channels

Agent Assist

Generate knowledge article prompts, suggested scripts, solutions dynamically to agents dynamically during conversation including best next action to resolve customer issues

Value Provided

CUSTOMERS

AGENTS
Time to Resolution
Reactive to Proactive: Service Customers with Real-Time Support

Gen AI is the strategic enabler that can enhance customer service through expediting and automating existing processes. Gen AI can not only improve the customer and agent experience, but it can also improve efficiency – increasing deflection and reducing handle time.

Issues and opportunities

Customer expectations for service offerings and experiences are elevated and constantly evolving. Customers demand better connectedness and personalization, seamless transitions across channels, and more rapid responses, all of which require real-time data to provide a deeper customer understanding at any given moment.

Gen AI can help analyze, understand, and respond to the personalized service needs at the speed customers have come to expect.

How Gen AI can help

1. **Virtual ask me anything**: Enable virtual agents and chatbots to answer unplanned for and open-ended questions leveraging client’s proprietary data and LLMs to get answers without escalating to agents. Facilitate the process and mitigate risk by leveraging human oversight to help ensure responses are validated, accurate, and positioned correctly.

2. **Voice to action**: Leverage Generative AI to summarize voice transcripts and customer details, providing greater context to agents as they take calls – reducing handle time and improving the customer experience. Use Gen AI to streamline the call wrap up process (summarize the voice transcripts to call out key topics, identify call types, set disposition, and identify next steps).

3. **Personalization**: Gen AI can rapidly generate personalized messages for resolution for customers based on their true issue at hand reducing manual Agent activities in crafting messages.

This applies if you have...

- Decreasing CSAT scores
- Low agent productivity
- High service costs

Potential benefits

- **Improve customer experience**
  Improve customer experience by providing greater transparency to agents as they engage with customers.

- **Enhance efficiency and productivity**
  Increase productivity by decreasing agent handle time with Gen AI features that streamline the conversation and lower the time it takes agents to find critical information.

- **Decrease cost**
  Decrease costs by providing greater functionality to increase containment within IVAs and virtual agents.
Agent Assist

Contextualize Every Conversation: Summarize Information Needed to Serve Customers

To an agent context of previous conversations and customer self-serve engagement is crucial for understanding customer needs better and identifying the exact resolution path for a client issue.

Issues and opportunities

Agents often encounter questions or topics they don’t already know. Traditionally, this would require detailed searching through documentation or knowledge bases, or by asking a supervisor / colleague which results in increased agent handle time and higher cost to serve.

In most situations, a customer engages with a self-service solution or another agent (in the case of escalation or transfers) without having insight into the previous conversations. Agents often need to digest large amounts of information while interacting with customers which can be time consuming and lead to misunderstanding.

Gen AI can quickly summarize the interaction in a very consumable fashion and provides the information needed to serve the customer in real time.

How Gen AI can help

1. Understand the customer: Gen AI and widely available LLMs can help with analyzing and customer profile, self-service, voice and email interactions with the customer and their issue for better servicing of the customer

2. Agent assist: Gen AI capabilities can provide self-service capabilities for agents to receive prompts, resolution scripts, techniques and knowledge articles based on agent inputs as well as proactively push training/knowledge articles relevant to Agent’s work to decrease time to proficiency

3. Cross-sell: By understanding the customer more holistically, Gen AI can generate recommendations on additional product features and services to Agents as next best action or directly to customers as automated and personalized outbound messages for improved cross-sell

This applies if you have...

• Lack of holistic view of customers
• Long average handle time
• Minimal cross-sell of products

Potential benefits

Better customer experience
Understanding the customer better can improve issue resolution time

Reduce time to proficiency
With Gen AI agents can get real-time and relevant prompts, access to knowledge articles and training to become more proficient in their jobs and able to solve customer issues faster

Increase in revenue through cross-sell
A deeper understanding of customers allows organizations to cross-sell in a more targeted and meaningful manner
AI Digital Assistant Transformation

**CHALLENGE**

Call center operating costs became prohibitive for a leading tech organization, principally due to ineffectiveness of the current solution to efficiently address customer needs.

The technology with time was out-of-date, needing disruption, revamp, and rethinking, with increasingly higher expectation from customers.

The demography of the user was changing with time, including their modes/styles of interactions with the enterprise. The millennial’s attention span and level of expectation from a service provider accelerated this need to embarking on transformation.

*What if Gen AI could effectively handle a great deal of these calls while routing the ones it couldn’t automatically solve?*

**SOLUTION**

The approach was to transform the call center into a contact center of the future and map out architecturally significant customer user cases. A critical piece was the development of the enterprise application architecture, architecture decision records, and the capability map, centered around Google’s CCAI platform, leveraging Dialogflow as the AI Brain for intent recognition, while integrating with IVR, CRM, and other backend applications through an API gateway.

An ‘AI in the cloud’ was developed: A voice virtual agent (VVA) in AWS Cloud that delivered a natural, more efficient and engaging customer experience, collecting payments from in-collection customers. This AI system leverages several ML models built for personalized negotiation with customers when they call in and are in conversation with the AI agent.

**IMPACT**

- After implementing all prioritized omnichannel use cases in the voice/chat/SMS AI channels, net savings is targeted to be $500 million/year

‘AI in the cloud’ generated exemplary results:

- More than 30 million annual calls handled by the VVA in production
- 90% containment rate (calls never get to a human)
- $150 million in annual savings
- 2X rate of collection
Service Transformation Focused On Transfer Rate Reduction

CHALLENGE

Following the implementation of a new Contact Center Platform and Conversational AI capabilities into their IVR, a bank began to experience a transfer rate that climbed to 40%.

The transfer rate increase led to issues with servicing inefficiency, failing customer satisfaction, rising costs, and falling first contact resolution.

A “tech only” approach to the challenge was not yielding results as it did not impact the whole entirety of the problem that encompasses underlying servicing processes as well as customer and employee insights.

What if Gen AI could help analyze internal data across the contact center to minimize the transfer rate?

SOLUTION

A Gen AI solution tackled the transfer rate from three stages within contact center engagement:

Before the client reached the agent, in the IVR, and after the call was routed to an agent. This dynamic tactic allowed for technology implementation and human behavioral change to address the rising transfer rate simultaneously.

Analysis of call data, IVR flow, and how callers interacted with prompts led to training this IVR to better understand customer issues helped direct calls to the correct agent and avoid transfers.

Instituting a new NLU model and integrating new intents addressed gaps in technology and processes to produce a higher performing IVR.

IMPACT

• Reduced transfers by a third, translating to saving over 2,300 transfers daily

• Total client interaction time decreased from an average of ~27 minutes in July 2022 to ~20 minutes since mid-March 2023, saving clients around 7 minutes when they call

• Overall CSAT score went from 4.17 to 4.26 from July 2022 to April 2023; CSAT scores related to auto phone prompts have increased from 3.67 to 3.73 and CSAT scores related to transactional phone transfers have gone up from 3.96 to 4.10
Omnichannel Strategy And Capability Planning

**CHALLENGE**

Many organizations have telephony systems and applications that are nearing obsolescence, often with redundant capabilities that limit the effectiveness of the overall architecture.

Voice self-service and other telephony capabilities can lag in comparison to modern platforms and constrain the ability to fully realize a digital-first strategy.

Plus, licensing and support costs for telephony can be in the millions, annually.

*What if Gen AI allowed you to expand the digital first experience while simultaneously increasing issue-resolution effectiveness?*

**SOLUTION**

Moving to a new telephony and omnichannel AI platform rationalized the technology stack and expanded the capability set.

Introducing modern telephony capabilities steered customers towards digital-first and empowered both customers and reps to more effectively handle interactions. Business units underwent the platform modernization and operating model update, with new competencies in agile, conversational design, CCaaS reporting and analytics.

Leveraging omnichannel AI and other capabilities helped to reimagine the contact journey in a way that reduces the need for person-to-person interaction.

**IMPACT**

- Self-service capabilities allowed for expedited handling of lower-complexity interactions through a customer’s channel of choice, leading to reduced customer effort

- Consolidating the technology stack and moving to a telephony platform with a more advantageous cost model reduced technology spend by up to $4 million

- New capabilities and omnichannel AI technology can yield up to $39 million in labor cost savings through contact containment and expedited call handling
Customer Success
Introduction: Gen AI and Customer Success

Generative AI can free up capacity to focus on helping customers drive value realization.

In recent years, the role of Customer Success has evolved from a reactive focus on churn prevention to the proactive delivery of outcomes in a consistent manner across the end-to-end journey, with the goal of maximizing value for customers from their offerings while providing a delightful experience.

Gen AI is emerging as a key priority for Chief Customer Officers (CCOs) whose goals are to retain and expand customer footprints, while simultaneously addressing productivity challenges. These challenges can stem from their customer success teams’ reliance on manual methods to perform baseline activities such as gathering and analyzing customer account data, creating and following up on strategic customer communications, and creating and maintaining success plans.

Gen AI capabilities can begin with automating these manual CSM tasks to free up capacity to focus on helping customers drive adoption and value realization.

**KEY POTENTIAL BENEFITS FOR CUSTOMER SUCCESS**

- **Faster time to value** through more personalized and quicker onboarding experiences and adoption issue resolution
- **Improved customer experience** from more self-service capabilities to inform product adoption and usage
- **Refocus CSM** time to value add activities by freeing up time from manual admin tasks through Gen AI automation
- **Reduced customer churn** through improved analysis of customer usage risks and proactive recommendation on mitigative actions

The Gen AI market for Customer Success is still in an early stage of maturity with companies looking to define and prioritize use cases across the post-sales lifecycle based on their target business outcomes and budgetary constraints.

There are signs of early movement in Customer Support focused use cases where link to investment and ROI impact is easier to articulate, and while Gen AI benefits for Customer Success are promising, successfully harnessing Gen AI capabilities as a competitive advantage will require having clean and organized foundational customer data.

In this chapter we explore the following use cases: Time to Value, Customer Value Realization, and Customer Expansion.
Gen AI Capabilities and Use Cases for Customer Success

Al interventions can help drive greater customer engagement and value realization at key points of the customer journey.

<table>
<thead>
<tr>
<th>ONBOARDING</th>
<th>DEPLOYMENT AND ADOPTION</th>
<th>USAGE AND OPTIMIZATION</th>
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<tr>
<td>Relevant, tailored onboarding resources for self-serve consumption</td>
<td>Co-pilot to surface contextual material to mitigate deviations from deployment / adoption milestones</td>
<td>Tailored insights on usage and suggested actions (e.g., new features) to drive value realization</td>
<td>Personalized and timely renewal / expansion recommendations based on contextual inputs</td>
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<td>End-to-end visibility of onboarding progress for both CSM and customer</td>
<td>Proactive guidance on next best actions to enhance adoption leveraging usage-based insights</td>
<td>Proactive notification of impending issues to minimize reactive support cases</td>
<td>Generate renewal contracts based on customer profile and purchase history data</td>
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<td>Training / support recommendations for most underutilized features to drive adoption</td>
<td>Knowledge based mining co-pilot to answer or surface resources to address issues and enhance usage</td>
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<td></td>
<td>Enterprise search to easily search and access learning content across platforms and modalities</td>
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**What AI Can Do For:**

- **CUSTOMERS**
  - **ONBOARDING**
    - Faster Time to Value
    - Improved and quicker onboarding
    - Improved customer experience and self-service
  - **DEPLOYMENT AND ADOPTION**
    - Accelerated adoption leading to increased customer stickiness and reduced churn risk
    - Focus of CSM teams towards value milestones instead of document creation / maintenance
  - **USAGE AND OPTIMIZATION**
    - Proactive mitigation for at-risk customers
    - Proactive mitigation for at-risk customers
  - **EXPAND / RENEW**
    - Outcome-focused renewal conversations

- **CUSTOMER SUCCESS MANAGERS**
  - **ONBOARDING**
    - Improved and quicker onboarding
    - Personalized and relevant renewals
  - **DEPLOYMENT AND ADOPTION**
    - Improved customer experience and self-service
  - **USAGE AND OPTIMIZATION**
    - Personalized and timely renewal / expansion recommendations based on contextual inputs
  - **EXPAND / RENEW**
    - Generate renewal contracts based on customer profile and purchase history data

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**CUSTOMER CROSS JOURNEY POTENTIAL BENEFITS**

- Faster Time to Value
- Improved and quicker onboarding
- Improved customer experience and self-service

**CSM CROSS JOURNEY POTENTIAL BENEFITS**

- Accelerated adoption leading to increased customer stickiness and reduced churn risk
- Focus of CSM teams towards value milestones instead of document creation / maintenance
- Outcome-focused renewal conversations
- Proactive mitigation for at-risk customers
Time to Value

Virtuous Cycle of Value Creation: Using Gen AI to Establish a Positive Effect on Value Realization

Gen AI has the potential to act as a trusted co-pilot for both customers and CSMs in accelerating time to value by personalizing the onboarding / deployment approach, and proactively communicating milestone deviations with recommendations to get back on track.

Issues and opportunities

Onboarding is the most widely received Customer Success service and if ably executed, can establish a gateway for future interactions and up-sell / cross-sell opportunities.

Many companies currently use either standard onboarding plans not customized for customers’ unique needs or custom content that is manually created by CSMs in a time-consuming manner.

In addition, CSMs find it challenging to track first time to value (FTTV) and in cases of any deviations from onboarding / deployment milestones, must manually parse through existing product documentation and training material to develop intervention recommendations in a reactive rather than proactive manner.

These factors can erode customer experience and slow down time to initial value realization leading to a cascading negative effect on adoption, usage, and renewal propensity.

How Gen AI can help

1. **Personalized onboarding**: Gen AI can generate custom onboarding plans and training material tailored to the customer’s products, use cases, technical environment, and prior usage history allowing for accelerated onboarding and reducing manual effort required by CSMs.

2. **Training co-pilot**: Gen AI can act as a training co-pilot for customers to surface relevant training material contextualized for specific scenarios providing self-service ability to proactively mitigate milestone deviation. The co-pilot can also be used by CSMs to build mini-knowledge capsules by extracting learning insights from existing product sheets / documentation.

3. **Proactive intervention**: Gen AI embedded in the product can track FTTV realization and provide customers taking a longer FTTV with personalized actionable recommendations and insights driven suggested next steps to expedite onboarding.

Gen AI has the potential to act as a trusted co-pilot for both customers and CSMs in accelerating time to value by personalizing the onboarding / deployment approach, and proactively communicating milestone deviations with recommendations to get back on track.

This applies if you have...

- Enterprise grade customers
- Large portfolio of new products and services
- Long FTTV and onboarding cycles
- Low activation or adoption rates

Potential benefits

- **Accelerated FTTV**: Accelerated onboarding and deployment allowing for a faster adoption ramp.
- **Improved customer experience**: Self-service options for customers to manage onboarding / deployment according to their needs, and enhanced ability to realize / demonstrate value.
- **Enhanced CSM productivity**: Minimized manual and time-consuming tasks allowing for proactive customer management.

Sources:
1. Deloitte Enterprise customer success study and outlook: What do customers value?
2. Deloitte Customer Outcomes: The Cornerstone of Exponential Growth
Customer Value Realization

Focused CSM Efforts: Using Gen AI to Drive Adoption and Value Realization Across the Customer Journey

Gen AI can enable proactive customer journey orchestration by generating usage-based insights and guidance, while automating manual and ongoing CSM tasks to free up capacity for driving adoption and value realization activities.

Issues and opportunities

Customers today are increasingly expecting solutions that deliver business outcomes and while ~90% discuss business objectives with providers, less than 1/3rd are eventually satisfied with value realized. This is driven in large part by companies struggling to effectively organize customer data and develop a full view of the customer account forcing CSMs to undertake time-consuming manual activities to meet baseline needs. For example, ~35% of CSM time is spent on compiling account updates and customer information from various tools, ~33% on curating materials, and driving follow-ups post customer meetings, and ~15% on basic creation and maintenance of Success Plans and milestones.

These factors distract CSMs from their core task of helping customers drive towards adoption and value realization milestones and hinder their ability to provide customers with tailored usage insights, and insightful next steps to drive value realization.

How Gen AI can help

1. Customer account insights: Gen AI can analyze a customer account snapshot on usage, support history, and feedback (created using traditional data or AI capabilities) to generate account level commentary on insights for driving customer engagement, increasing adoption of new product features, and intervention recommendations for customers at risk for churn.

2. Success plan creation and tracking: Using an initial set of inputs related to customer profile and deal information, Gen AI can create customer specific success plans with pre-populated goals, milestones and actions, and then analyze product telemetry data to track progress against key value milestones.

3. Customer communication automation: Gen AI can be leveraged to analyze account / product data to auto populate meeting templates with summary of usage and health trends, along with transcribing meetings and analyzing contents to capture, summarize and socialize important takeaways and action items.

This applies if you have...

- SaaS, Cloud, or commoditized products with intense competition
- Budgetary pressure to reduce cost to serve
- Declining or stagnating ARR

Potential benefits

- Increased product stickiness
  Higher adoption of product features and accelerated realization of customer outcomes through enhance success plan tracking

- Enhanced customer outcomes focus
  Reduce cost to serve and free up CSM capacity to focus on managing customer outcomes and driving adoption / usage by automating routine and periodic tasks

- Increased customer retention
  Reduced churn through identifying early risk indicators and generating customized interventions for at-risk customers

Sources:
Customer Expansion

Evolving Expansion: Adapting Product Fit through Holistic Understanding and Team Approach

Gen AI can enhance upsell and cross-sell motions by assessing which product combinations may be best positioned for the customer based on past usage and experience, and provide internal teams with holistic customer account insights to inform renewal discussions.

Issues and opportunities

Recently there is an increased business focus on retention and expansion of existing customers as a key growth driver, and customers in turn are expecting a seamless, personalized, and integrated experience.

Today however renewal and expansion plans are manually created and pursued by different teams without a holistic understanding of customer target outcomes, adoption and usage trends, past support experience and feedback. Customers are pitched new products discretely rather than in terms of overall outcomes delivered by the portfolio. Furthermore, renewal quoting and contracting processes can be time consuming, elongating the renewals cycle.

This can lead to a dis-jointed customer experience and upsell / cross-sell communications not aligned with customer needs leading to missed expansion opportunities.

How Gen AI can help

1. **Drive upsell and cross-sell opportunities:** Gen AI can summarize product release notes to associate features with customer needs / usage patterns, thereby drafting targeted and contextual upsell and cross-sell communications.

2. **Auto-generated renewal contracts:** Using customer profile and purchase history data, Gen AI can auto-generate renewal contracts minimizing manual CSM work and driving consistency in templates.

3. **Surface themes for renewal discussion:** In the lead up to renewal discussions, Gen AI can analyze customer call notes, support cases, survey results, usage patterns to highlight most relevant customer themes for CSM and broader account team.

4. **Enhance at-risk account management:** In combination with predictive AI capabilities, Gen AI can enable CSMs to focus on their most risky accounts by summarizing renewal propensity analysis outputs at scale and providing insights and commentary on key risk drivers.

This applies if you have...

- Large portfolio of products and services
- Strategic focus on customer retention and growth
- Financial targets around annual recurring revenue (ARR) and net dollar retention (NDR)

Potential benefits

**Account expansion**

Drive product expansion and create new opportunities leveraging knowledge of customer usage and goals.

**Renewal efficacy**

Enhance renewal efficacy by leveraging a robust 360 degree understanding of customer's past experience and value captured from the product.

**Accelerated renewal process**

Improve renewal process efficiency by automating and standardizing manual tasks such as generating new renewal contracts.
Customer Success Virtual Assistant

**CHALLENGE**

In the current state, field engineers for a leading semiconductor company manually search technical documentation to respond to customer queries related to product selection, which is time-consuming and presents an opportunity for improved efficiency.

This process of searching for product details was cumbersome, tedious, and prone to errors, which can potentially result in an unsatisfactory customer experience.

What if Generative AI could enhance engineer productivity, reduce labor time in responding to customer inquiries, and improve searchability and speed to insights across distributed information sources?

**SOLUTION**

An internal-facing ChatGPT-like experience fine-tuned on the company’s own data served as a virtual assistant during customer product search and selection.

The solution used Gen AI to search across distributed sources of information and generate accurate answers, improving engineer productivity, reducing time in responding to customer inquiries, and enhancing the overall customer experience by implementing the following processes:

- Parsing and index the given enterprise dataset
- Performing semantic search on the entire dataset based on the given user query
- Customizing prompts as per the needs of the enterprise
- Leveraging Gen AI model to generate Natural Language Response to a given user query

**IMPACT**

Average improvement in cycle time shifted from 2 weeks to 2 days

An AI foundry to scale out this PoC is anticipated to provide the following benefits:

- Faster and more personalized experience to search and select products
- Increased revenue resulting from differentiation, better customer retention, and cross-sell/up-sell
- Enablement of engineers to quickly access relevant product info without relying on manual search and help customers consider solutions that may have otherwise been missed
Customer Success Gen AI Strategy Development

**CHALLENGE**

Leading organizations are looking to define their Customer Success (CS) AI strategy and prioritize areas most conducive to Gen AI-based interventions—removing CSM productivity blockers and enhancing customer experience.

To operationalize this strategy, organizations seek to develop AI automation roadmaps with prioritization and sequencing of AI roll-outs based on business impact, deliverable complexity, and time to value.

*What if Gen AI provided the power to deliver these experiences through automation and free up time to focus on customers?*

**SOLUTION**

By conducting CS experience design workshops and complementing them with interviews and survey across different CS disciplines, companies can capture experience needs and understand productivity blockers.

In doing so, CS managers can identify the top CS time spend areas that create the most productivity blockers and develop Gen AI use cases to automate manual CSM tasks and free up their time to serve customers more holistically.

These use cases can be prioritized based on expected impact, data readiness, and time to value, and then categorized into five tracks to drive end-to-end AI scenario design, build, and PoC launch.

**IMPACT**

- Use cases target and impact the top CSM time spend areas currently consuming the most CSM time
- Previously manual CSM tasks can be automated, boosting productivity and increasing efficiency

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*AI IN ACTION: APPLICATIONS FOR CUSTOMER SUCCESS*
Building Trust with customers is a key step in realizing the full potential of Gen AI

Context

CRM is all about relationships, with increasingly complicated business models, channels, products, technology and services; sometimes organizations can forget that there is a human on the other end of every transaction. A human whose thoughts, preferences, feelings, needs and behaviors are more complicated and unpredictable than any algorithm humans (or Gen AI) can build (for now).

The current Gen AI ‘moment’ is as significant (or maybe more) than the creation of the printing press, photography, or the smartphone and business leaders are rushing to figure out how Gen AI impacts every aspect of their businesses. The urgency of the question is only rivaled by the complexity of the answer. It is up to those business leaders to make the strategic judgment calls on how, when and where to bring Gen AI into their workforces to serve their customers.

However, trust is at an all time low and has been steadily declining across all core institutions for the last 50 years. This decline in trust has been particularly felt in big business, accelerated by technology and the decrease in human interaction. Applying generative AI effectively in CRMs will require building trust with the humans who will interact with it.

The Human Challenges of Gen AI

1. Data abuse: Data can be inappropriately used, with heightened concerns about surveillance, privacy, and potential infringement of intellectual property

2. Bias and misinformation: Data biases could propagate both unintentionally and intentionally:
   - Bias in training data (e.g., over/under-representation of a population cohort, sexism, racism), then outputs generated could exhibit biases as well
   - Intentional use for spread of misinformation and unintentional propagation of biases

3. Human empathy: Algorithms and models lacking empathy, difficulty in finding the “right” value system for guardrails

How AI Can Erode Trust

The following data points on the impact of AI with customer trust were derived from a survey of 500 respondents administered in August 2023:

- Trust in a brand decreases by 144% amongst customers who know the brand is using AI
- Customers view brands that leverage AI representatives for customer interactions as 157% less reliable than brands that use human representatives
- Workers are also skeptical of AI and see their employer as 139% less trustworthy when AI-enabled tools are integrated into their workflows as compared to non-AI tools
- During issue resolution at a contact center,
  - Customers have 51% lower trust when their issue is addressed by a bot vs. a human
  - Customers view a brand as 65% less capable when their issue is addressed by a bot vs. a human, the largest relative decrease across the Four Factors

The use of AI can erode customer trust. Steps can and should be taken to not only mitigate this impact, but to proactively build trust – with an eye for how the models are deployed and an understanding of the humans using them.

Sources: 1. Deloitte TrustID™ + Gen AI Study, August 2023 (n=500)
To build trust around Gen AI, two elements must be addressed...

1. The Machine Elements

The “machine” elements are the Gen AI inputs (e.g., the nature of the underlying data sources, how highly confidential customer data is secured) as well as the outputs (preventing or at least mitigating model “hallucinations,” consistency and accuracy, human oversight, etc.).

2. The “Human Elements”

Often overlooked, the “human” elements: a deep understanding of both the workers and customers who will use these models, and how to address the very real human feelings of uncertainty, mistrust, or at times fear of these new technologies.
Bringing trusted Gen AI for CRMs to life requires considering these questions

**The Machine: Inputs**

How can the input data be trusted? In other words, how might organizations: Develop responsible processes and governance? Prevent data from being biased? Protect data, especially Personally Identifiable Information (PII), and comply with privacy laws?

**The Machine: Outputs**

How can the Gen AI content be trusted? In other words, how might organizations: Prevent hallucinations where outputs are factually false with unavailable sources and citations? Ensure generated outcomes are consistent? Be confident that outcomes are accurate and reliable?

**The Human: Workers**

How will employees trust and embrace AI? In other words, how might organizations: Create new processes and train new methods that change employee behaviors to work well with our newest generation of AI employees? Maximize the value of Generative AI by emphasizing new growth opportunities (vs. solely replacing what is done today)?

**The Human: Customers**

How satisfied and happy will customers be? In other words, how might organizations: Leverage Gen AI to build more hyper-personalized and localized offerings for customers? Use Gen AI to increase customer engagement?

**Trustworthy AI Framework**

Ensure key dimensions of the Trustworthy AI Framework are addressed when using Gen AI:

- Safe and secure
- Private
- Transparent
- Fair and impartial
- Robust and reliable
- Accountable
- Responsible

**Deloitte’s TrustID™**

Apply the four factors of TrustID to predict how emotions will impact customer, worker, and partner behaviors:

- Humanity
- Transparency
- Capability
- Reliability
How can the input data be trusted?

How might organizations...

- Develop responsible processes and governance?
- Prevent data from being biased?
- Protect data, especially Personally Identifiable Information (PII), and comply with privacy laws?

Secure data
Data security has increasingly become a top priority for customers and businesses, with many countries increasing and tightening regulations over the past decade. As Generative AI is a newly developing space, one can expect its data use to become equally scrutinized. To prepare for this, companies should ensure their data meets regulatory requirements for their business areas, mask data whenever possible, limit access to only required users.

Use trusted data sources
One of the best ways to trust the input data is to feed the Generative AI model data that is yours. Compile a list of known, trusted sources for content to be developed from (e.g., first-party data from Customer Data Platform) and prompt Gen AI to create content using those trusted sources. This also requires robust data governance to manage any data changes to those sources do not negatively impact the Generative AI model.

Develop a supporting operating model
Properly utilizing Generative AI requires an enabling operating model that considers key Gen AI capabilities and how different functions will interact with it to support the business needs. Consider integrating a Center of Excellence that helps various groups across the organization use Gen AI in a consistent manner. Components for consideration include AI strategy, AI governance, AI solution delivery, technology foundation, enterprise AI program management.

Align on proper data ownership
With different types of data being used to make the Generative AI algorithm more robust and with more third parties becoming involved with the technology, it is key for businesses to identify upfront who owns which pieces of data used. Ensure that all data rights have been cleared before inputting it into the generative AI model.
How can the Gen AI content be trusted?

How might organizations...

- Prevent hallucinations where outputs are factually false with unavailable sources and citations
- Ensure generated outcomes are consistent?
- Be confident that outcomes are accurate and reliable?

Maintain a human in the loop

Building trust and confidence in the output requires keeping a ‘human in the loop’ to review and verify Gen AI outputs before taking action on it. Businesses will be responsible for developing their own thresholds for acceptable margins of error before confidently allowing the Gen AI outputs to take action on their own.

For example, in Sales, Gen AI can be used to generate customized emails to accelerate lead generation. With a human in the loop, the process would be:

1. **Generative AI model to provide an initial draft of the email**
   - Human (salesperson) prompts the Gen AI tool (e.g., Open AI) to generate content using the list of known, trusted sources (e.g., business’s own first-party dataset in your CDP)
   - Gen AI tool to create an initial draft

2. **Human to decide whether to take action**
   - Sales representative to review the initial draft (Gen AI output), and make adjustments / direct edits as needed
   - Determine whether email is ‘complete’ and then send out to the customer

Incorporate Reinforcement Learning from Human Feedback (RLHF)

Not only should humans stay in the loop as Gen AI is being used, but also human feedback should be incorporated to improve future iterations of the generative AI algorithm. Keeping with the Sales lead generation example above, the model could identify the types of manual edits the salesperson made to the AI-generated email draft before the email was sent out. The model could also track how effective responses were to the emails that were sent out (e.g., how many were opened, whether the desired customer action was taken, or sale was closed) to better tailor the types of emails generated.
How will workers trust and embrace AI?

How might organizations...

• Create new processes and train new methods that change worker behaviors to work well with our newest generation of AI workers?
• Maximize the value of Generative AI by emphasizing new growth opportunities (vs. solely replacing what is done today)?

Understand the worker
Getting the worker bought in to working with Generative AI requires understanding what employees are motivated by and anticipating how they could respond to integration of Gen AI into their current workflows. There are tools like TrustID™ to measure worker trust sentiments today (ex: I am a top Sales person and always doubling my quota) vs. tomorrow (ex: my unique and effective communication style that has made me a top Sales person is now being used by our Generative AI to help other Sales people outperform me).

Focus on productivity benefits to improve the current business
With many workers likely to fear that their job functions (and potentially they) are being replaced by generative AI, businesses should focus on how workers (not just businesses) can benefit from increased productivity gained by using Gen AI. This mindset requires not only understanding the productivity benefits to current tasks, but also preparing workers to use this newly available time to gain new skills or focus on more creative tasks that Generative AI cannot reliably handle.

Develop an innovation process to drive new business growth
Identify new AI Tools that help expedite the research, synthesis, and prototyping in the innovation process. Gen AI can be used in Research and Synthesis (generate themes and insights instantaneously and allow for more interviews) and Rapid Prototyping (accelerate ideation, create baseline prototypes, enhance design skillset and create formatting standards at a faster and more efficient pace).

Prepare a change management plan
Bring workers along the Generative AI journey and evolution with a thorough change management plan to build trust not only through increased transparency, but also through strengthened capability. Evaluate what skills are required to achieve the future state that are not readily available today. Then, determine which individuals will need to be trained and develop trainings to address those gaps. Lastly, prepare a roll-out plan and appropriate communications to share with the broader organization.

Powered by TrustID™
How satisfied and happy will customers be?

How might organizations...

- Leverage Generative AI to build more hyper-personalized and localized offerings for customers?
- Use Generative AI to increase customer engagement and sales?

Understand the customer
In order to help ensure Generative AI is applied in a way to improve customer experiences, businesses can conduct ethnographic research to understand customers’ wants, desires and needs. There are tools like TrustID™ to measure customer trust sentiments (ex: Customers view a brand as 65% less capable when their issue is addressed by a bot vs. a human, the largest relative decrease across the Four Factors1).

Evaluate products and services along the journey
Through Journey Mapping and Service Blueprint exercise, companies can understand when to use Gen AI tools, human interaction, or a hybrid approach with customers. After completing ethnographic research to understand the consumer’s needs, desires, and pain points – companies will be able to understand which moments require a genuine human interaction between consumer and company or if an AI powered human interaction will be appropriate during a specific moment in the user journey. Accompanying the journey with a Service Blueprint will help companies understand the underlying orchestration, technical capabilities and required operations to achieve the ideal consumer scenario.

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Sources: 1. Deloitte TrustID™ + Gen AI Study, August 2023 (n=500)
Why Trust Matters in Service Interactions

### Before Conversation

**Workers**
Fear their productivity and choices are being monitored more closely (impacts the training of the Generative AI model) in addition to their job function being replaced.

**Customers**
Ignores the outreach because they think the ‘moment’ was irrelevant or is concerned and creeped out because they did not know that company tracked that level of consumer data.

### During Conversation

**Workers**
Today’s most knowledgeable and well-trained call center representatives may fear increased competition now that other representatives have easy access to complex information.

**Customers**
Frustrated with unreliable service between interacting with representatives who know how to use generative AI efficiently (leading to faster issue resolution) and those who do not.

### After Conversation

**Workers**
Time spent reviewing the Generative AI output and if it’s incorrect, having to rewrite everything anyway before it gets sent out.

**Customers**
Can sense that AI was used given the speed the follow-up was sent at and tone the that was used; feels impersonal interacting with a machine and like the service representative or company doesn’t care about them.

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**Applying TrustID™ to Take Action**

**Potential Trust Concerns**

- **Humility**: Show workers how they can use their time more productively with other trainings or more creative tasks.
- **Capability**: See which types of ‘moments’ customers respond to most (and stop sending notifications for ineffective ones).

**Workers**
- **Humility**: Understand worker sentiment via ethnographic research and evaluate worker incentive structures.
- **Reliability**: Prioritize worker trainings to teach how to effectively prompt or use gen AI.

**Customers**
- **Humility**: Show workers how they can use their time more productively with other trainings or more creative tasks.
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- **Reliability**: Prioritize worker trainings to teach how to effectively prompt or use gen AI.

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**Sample Gen AI Applications**

Before Conversation

Rather than waiting for a customer to reach out to the service center with a problem, businesses can develop auto-generated personalized emails tailored to customer’s unique situation and time outreach at moments that matter, anticipating customer needs.

Workers

Fear their productivity and choices are being monitored more closely (impacts the training of the Generative AI model) in addition to their job function being replaced.

Customers

Ignores the outreach because they think the ‘moment’ was irrelevant or is concerned and creeped out because they did not know that company tracked that level of consumer data.

During Conversation

When a customer does get in contact with a call center or service desk, use Generative AI to create a Knowledge Article or customer response based on a prompt that addresses and resolves the customer’s exact situation or issue in a rapid manner.

Workers

Today’s most knowledgeable and well-trained call center representatives may fear increased competition now that other representatives have easy access to complex information.

Customers

Frustrated with unreliable service between interacting with representatives who know how to use generative AI efficiently (leading to faster issue resolution) and those who do not.

After Conversation

Once the live call is complete, access summaries, store new relevant data to the customer information, access insights into customer needs, and identify cross-sell opportunities. Utilize auto-generated follow-up communications to customers.

Workers

Time spent reviewing the Generative AI output and if it’s incorrect, having to rewrite everything anyway before it gets sent out.

Customers

Can sense that AI was used given the speed the follow-up was sent at and tone the that was used; feels impersonal interacting with a machine and like the service representative or company doesn’t care about them.

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**Humanity**: Understand worker sentiment via ethnographic research and evaluate worker incentive structures.
**Capability**: Provide worker opportunity to edit the follow-up before sending; see what edits the worker made and provide that feedback to the Generative AI model.
**Transparency**: Mention when generative AI is used in follow-ups to customers (vs. pretending it is from a human Service representative).
How to Get Started with Gen AI 08
How to Get Started with Gen AI

When considering the vast opportunities for how to leverage Gen AI across these domains, it’s understandable to wonder where to begin. After all, not every organization has the right people in place, tech stack to enhance, data to leverage, or capital to deploy at a scale to benefit from Gen AI.

But there are certainly ways that every company can begin. And, while surprising, it doesn’t necessarily have anything to do with existing tech or capital available. It really starts by understanding your current customers and employees and finding incremental ways to make their experiences incrementally better. Because the true value of enhancing an organization by leveraging Gen AI isn’t cost-cutting or driving efficiencies – though those can be additional benefits. Rather, it’s about leveraging this technology to create tangible value for both customers and employee groups across the end-to-end customer lifecycle.
Revisit the customer lifecycle and identify areas to add value

Understanding this lifecycle is the most critical first step. It will introduce all the points at which customers engage with a brand, what various goals are at each stage, where people are enjoying the experience, and, most notably, where there is friction. Part of this is understanding where in the lifecycle you want to create value—what are the goals and outcomes you’re looking to achieve?

When an organization can articulate these goals and understand this lifecycle and all of the parties that participate (customers, sales teams, service support, retention teams, etc.) it can begin to generate use-cases to either address and improve upon pain points or find new ways to enhance already positive experiences.

When starting out though, they will need to be prioritized accordingly—perhaps based on current capabilities, or level of investment vs. impact. Consider what roles, talent, and processes exist today that can be leveraged, and what technology architectures are in place.

HIGH LEVEL CUSTOMER LIFECYCLE

DISCOVER | EVALUATE / TRY | BUY | ONBOARD / USE | MANAGE | EXPAND / RENEW
Detail out a pilot program and be cognizant of the risks

Once the priority use cases are identified, it is time to detail out a pilot program to test using Gen AI. For that use case, identify what success looks like, what will be needed on top of what exists today, what vendors and/or partners the be engaged, and what KPIs will be tracked along the way. A key to this phase is to ensure input data will support the vision set for target outputs.

Further, identify what elements of the experience will be preserved from the current state. Developing and preserving trust is key when exploring any Gen AI solution, so a pilot should not only address what will need to change from today but also preserve what already works.

Finally, pencil out any risks with the pilot program and create controls, accordingly.

POSSIBLE RISKS

- **Hallucination**
  Models might output facts that are factually false. Sources and citations are unavailable for most models

- **Nuanced Inaccuracies**
  For complex topics, the model may provide information that looks correct but is inaccurate given contextual nuances

- **Public Data Sources**
  Models are typically trained on public sources that are often unverified and can contain misinformation

- **Bias In, Bias Out**
  Bias in training data (e.g., over/under-representation of a population cohort, sexism, racism), then outputs generated could exhibit biases as well

- **Model Performance**
  Lack of considerations for model performance limitations could lead to sub-optimal business outcomes

- **IP Protection and Infringement**
  SaaS-AI companies may save some or all of prompt history for future training which could lead to sensitive information leaks

- **Malicious Behavior**
  Generative AI tools may be targeted by adversaries to reveal sensitive information and/or take malicious actions on networks and data

- **Confidentiality and Privacy**
  Generative AI tools are typically consumed as SaaS. Personally Identifiable Information shared may not comply with privacy laws

- **Cost**
  Current pricing models could lead to uncontrolled costs for organizations when used at scale

- **Ethical Use**
  Generative AI tools may be used in a manner not intended and to circumvent organizational policies, laws and regulations

- **Model Performance**
  Lack of considerations for model performance limitations could lead to sub-optimal business outcomes
Launch the pilot and iterate

Now, it’s time to test. Apply the technology and iterate based on real-time learning. As the project progresses, identify the points that are surprising and see if they can be addressed without starting over. What’s working well? What was learned that was not expected? What can be taken to the next pilot use case?

This “fail fast, fail often” approach can provide a bias to action mentality and an ability to learn from mistakes without having those mistakes derail the entire initiative or break team morale.
Scale across the organization and codify

Once the pilot program is cruising, start thinking about where to go from here. What are the next use cases that could complement what has already been done? This is the point at which Gen AI can begin to be woven into the fabric of an organization.

Scaling is also where Gen AI can get complicated. To help minimize pitfalls like process disruption, culture clashing, or overly complicated technology architecture, implement a governance structure and leverage existing processes to boost probability of success. As things continue to grow, consider how Gen AI can be combined with traditional AI and other technologies to drive greater value for the customers, employees, and the organization.

SCALING ENABLERS

Governance:
Define the AI narrative and scope, manage budget allocations, provide governance structures, drive collaboration across functions, and establish best practices

Processes:
Consider what processes exist today, weave usage of Gen AI into those long-standing norms, and, if necessary, define new processes that incorporate Gen AI into new process flows

Technology:
Select the right model(s), refine the technology stack to incorporate Gen AI into what already exists today, and leverage traditional AI to boost the value of Gen AI
Keep exploring

Gen AI will not be perfect in an organization’s first attempt, which is why measuring progress, tracking success, and always looking to improve is paramount. Think back to the end-to-end lifecycle, and ask, “How are we improving the experience for our customers, partners, and employees? What are they achieving now that they couldn’t before? What else could be provided to make the experience better?”

The possibilities are endless.

Pilot
Identify no-regrets use cases, define business value, understand architecture choices, uncover legal challenges and discover potential trust and adoption challenges through a pilot implementation

Learn
Rollout pilot to a wider audience to harden trust, value measurement and adoption strategies, prioritize overall use cases, develop use case roadmap, create business case, define AI Cloud architecture and stand up an AI CoE for future use cases

Scale
Execute on roadmap to rollout use cases across the enterprise with trust and adoption, measure success, optimize application for quality and cost, manage application landscape for operations
Getting the most value from Generative AI

As we’ve highlighted in this guide, Generative AI offers businesses the potential to boost employee productivity, deliver personalized experiences to customers, and drive tangible value for their organization. Particularly when an experience and value-first approach is taken, AI becomes a competitive necessity for most organizations. We know this technological transformation can seem intimidating, but like any transformation, it starts with a first step.

The key to the first steps is to start small but think big. According to a recent Deloitte survey—State of AI in the Enterprise, 3rd Edition—74% of businesses surveyed are still in the AI experimentation stage. At times lacking a clear vision of how all the pieces fit together, businesses are focused on modernizing their data for AI and building AI expertise through siloed pilot programs and proofs-of-concept. By contrast, only 26% of businesses surveyed are focused on deploying high impact AI use cases at scale, which is when the real value kicks in.

The examples in this document not only showcase the potential value that can be unlocked by orchestrating experiences and interactions across end-to-end journeys and through each customer-impacting domain, but it also considers some of the associated challenges and risks when applied to the customer domain. Understanding these challenges and risks with scaling Gen AI can help teams better prepare to address them and ensure Trust is maintained and enhanced for customers, partners, and employees.

This is an exciting time, and our goal is to help our clients harness the foundation of Generative AI in a trustworthy and sustainable way, from strategy to scale. Join us.

REQUEST A MEETING

Get the most value from Generative AI

Sources: 1. State of AI in the Enterprise - Link

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Sources: 1. State of AI in the Enterprise - Link
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