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The GenAI Issue

How generative artificial intelligence and large language models are impacting customer service, marketing, and sales



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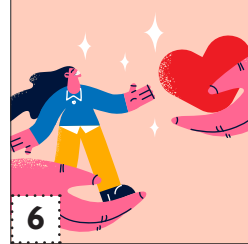
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GenAI's Time Has Come. Are You Ready?

Just as it did in 2023, artificial intelligence—and more specifically generative AI—is sure to dominate the news cycles in 2024.

Based on our own internal analysis, seven of the top 10 news stories of 2023 on our DestinationCRM.com website were about AI. New generative AI product releases and integrations were an almost daily occurrence, as technology vendors big and small were under constant pressure to bring something genAI-related to market. Some vendors led, others played catch-up, but almost everyone had some kind of generative AI innovation in the pipeline.

There were also plenty of industry experts issuing stark warnings about very ominous-sounding things like hallucinations and biases, foreshadowing huge damage to company reputations if generative AI gets it wrong.

On the business side, companies in every industry were weighing their options, either actively testing generative AI through pilots or using it on a limited basis while looking for that delicate balance between long- and short-term benefits and costs.

Truly, to say that there was a lot of hype around generative AI in 2023 would be an understatement. Well, now it's 2024; the hype is over, and the real work of making generative AI work has begun. Proof of this can be found in "A Look Ahead at CRM in 2024," on pages 12 and 13. Not surprisingly, many of the industry pundits whose opinions are presented on these pages had plenty to say about generative AI, and theirs are only a small sample of all the predictions we received. Additional [predictions](#) can be found on our website.

So as we enter the new year, the question becomes how quickly companies will be able to scale up their use of generative AI. Several recent industry studies have found that the vast majority—in some cases, 85 percent or more—of C-suite executives plan to increase their spending on generative AI this year, labelling it a top three priority. If top executives have their way in 2024, we should expect to see more businesses moving past small pilots to scaled implementations.

That's not going to be an easy task. Amid continued economic uncertainty, budget constraints are a

serious hurdle, and generative AI can be an expensive technology.

Successful adoption of generative AI in customer service, marketing, and sales will also require rigorous technical expertise and planning, something that is still in short supply at most organizations.

Beyond limited skills and financial resources, other challenges with generative AI remain and are likely to do so for quite some time. These include data complexity, ethical concerns, privacy and security issues, and problems getting solutions to integrate with other software and infrastructure already in place and with future purchases.

In 2024, navigating the generative AI landscape will not be easy. The industry is fragmented, the pace of innovation is unprecedented, and the options are almost limitless and very confusing.

Nonetheless, companies that have been sitting on the sidelines cannot afford to continue doing so. Inertia is no longer sustainable.

That's why we decided to start the year off with an entire issue dedicated to generative AI. In our three features in this issue, we discuss what's possible with generative AI today, what might come to pass in the coming months and years, which considerations must be taken into account when rolling out some form of generative AI, and which business functions are most likely to be impacted.

A common thread in all three of these articles is that assessing your digital and technical maturity, current processes, staffing, and company culture are necessary to maximize the impact of generative AI over the long term.

The bottom line is that everyone must be mindful that we are still in the early stages of generative AI development and adoption. As we progress from pilot to real-world implementation, success models, underlying technologies, and best practices will continue to emerge and evolve.

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THE HYPE IS OVER,
AND THE REAL WORK OF
MAKING GENERATIVE AI
WORK HAS BEGUN.

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Digital twins can help companies guide customers to the ideal outcomes on their journey rather than forcing them down a predefined path.

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Solutions and technologies available to contact centers can help their agents find the work-life-balance that quiet quitters seek out.

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What I Learned Designing a CRM from Scratch

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What Consumer Shifts in Data Ownership and Brand Engagement Mean for Marketers

Marketing trends are evolving at a challenging pace, and data privacy changes are calling for marketing teams to future-proof their success.

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How Technology Is Transforming the Sales Team

As the digital-first workplace becomes more widespread, sellers are evolving how they sell, and new technology is facilitating the rapid transformation of the traditional B2B sales environment.

HENDRIK ISEBAERT, CEO, SHOWPAD

Data Is the Untapped Source of Successful Customer Intimacy

The key is knowing the right data to gather, to focus on, or to use in decision making—and using it in a way that ultimately builds and sustains a continued cycle of customer loyalty and growth.

MICA ZUNIGA, CHIEF STRATEGY OFFICER, XENON ARC



By JUDY WEADER

CX Pros Will See a Year of Post-Pandemic Push-Pull

With genAI on tap, 2024 will bring plenty of customer experience opportunities (and pitfalls)

Every Jan. 1 holds the promise that the new year will bring prosperity, joy, or excitement that exceeds what was seen in the prior year. As we look ahead to 2024, Forrester Research expects that customer experience (CX) professionals will find the upcoming year *fun*—depending on one’s definition of the word.

The past couple of years have been challenging for CX pros. The pandemic threw an epic curveball at experience design and delivery, forcing a massive rethink on how businesses engage with their customers. As the economy went on a related roller-coaster ride, budgets tightened to the point that even modest increases in CX team funding seemed like a victory. And then, in the second half of 2023, we found ourselves caught in a post-pandemic push-pull: While generative AI, the latest shiny object, opened the door to a future of new discoveries, many businesses retreated to old-school, conservative policies and practices that limit their ability to stride boldly forward.

Let’s start by talking about this in terms of numbers. In 2023, Forrester’s average U.S. Customer Experience Index [scores dropped for the second year in a row](#), primarily driven by poorer performance in delivering positive emotional experiences. It’s certainly possible that economic uncertainty led to

belt tightening that constrained companies’ ability to provide experiences that met consumers’ continually increasing expectations. Anecdotally, this shows up in two forms: (1) firms reducing the staff who manage and design experiences, and (2) firms reducing the staff and overall resources of the team

charged with the delivery of experiences (note that these are not mutually exclusive). Couple that with the increase in customer-obsessed firms (a number that doubled, but from an anemic 3 percent to 6 percent), and one wonders where we go from here.


With that in mind, let’s dive into our CX predictions for 2024:

The global average customer experience will improve for the first time in three years. Signs point to an increase in the average CX rating for next year, although that doesn’t mean these increases will be across the board. While most companies will see their CX ratings stay flat year over year, we expect that the small number of them that have seen increases during

the leaner past couple of years will be the ones that pull the average up. Improvements will likely be more pronounced in Europe and the Asia-Pacific region, and we expect the U.S. to do better than Canada. What will be the difference? We anticipate that behind-the-scenes generative AI in the contact center will help employees overcome other experience shortfalls, buoying the customer service experiences that consistently land as the No. 1 or No. 2 driver of experience ratings.

Half of large global firms will experiment with customer-facing generative AI. I’m now regularly getting questions from clients about whether they should care about generative AI. My answer, in short: Yes, and they wouldn’t be alone in doing this (42 percent of AI decision makers cited improving or personalizing CX as a top generative AI use case). Opportunities abound for internal and external applications, but as with any new technology, we don’t recommend proceeding without planning and guardrails. The firms that will do the best with customer-facing generative AI will build the internal capabilities first, learning how to manage the technology while harnessing its benefits for employees. Then they’ll determine where it will accelerate work that ends up as part of customer-facing experiences (such as marketing content) and/or as a primary customer interface (such as a chatbot).

One-third of all brands will launch experiences that are biased, inaccessible, or harmful. All this talk of the future makes return-to-office (RTO) mandates sound even more dissonant, particularly as remote and hybrid work have enabled the inclusion of marginalized people’s voices in CX design and delivery. We anticipate that hard-line RTO policies will lead to attrition and silencing of voices in a way that leads to products and services failing key [inclusive design standards](#). The larger the customer base, the bigger the potential for negative impacts. Firms can avoid failing their customers by first looking at how they can support the inclusion of a diverse workforce. At a minimum, we advise adjusting RTO policies to enable a broad array of accommodations and [limit required in-office time to punctuated moments](#).

To dig deeper into these and other predictions for the coming year, check out [Forrester’s Predictions hub](#). 

Judy Weader is a principal analyst serving customer experience professionals at Forrester Research. Based in Cambridge, Mass., Weader uses her decade-plus experience in CX and her background in healthcare, financial services, and government to assist clients with establishing, funding, and scaling their CX functions.



The Various Roles of Sales AI

How are sales organizations actually leveraging AI?

In my past two columns, I examined the [impact](#) that sales artificial intelligence will have on the profession of sales and then looked at the ROI sales AI is already generating [today](#). Here, let's dive into how leading-edge sales organizations are currently leveraging sales AI to increase the performance of their sales teams.

As part of the 2023 Sales Performance Scorecard study, Sales Mastery surveyed more than 500 sales executives. For those working for firms that have already started to implement AI to optimize sales performance, we asked them to share with us the specific types of functionalities they're harnessing. The chart summarizes their responses.

Through a series of case study interviews, details on how these capabilities are being put to use emerged. What we see is two main categories of application. The first is leveraging sales AI to reduce the administrative burden on salespeople. AI is able to take over a variety of time-consuming tasks such as scheduling appointments, documenting the outcome of sales calls, sending relevant information to other sales team members and managers, creating/updating CRM records, etc. This in turn gives salespeople more time to spend on actual selling tasks.

The second category of usage is more about sales effectiveness. Sales AI can help identify which prospects to pursue (and why) and then generate highly targeted messaging to motivate a prospect to want to start to engage with a sales-

person. Then during the sales cycle, AI can create customized sales content that is tailored to prospects' unique needs, give intelligence on which individuals to engage inside a prospect's organization, provide 24/7 coaching to salespeople on which steps to take next and how to execute them, and so on. Buttressed by all this support, sales professionals can more effectively engage with prospects throughout the sales process.

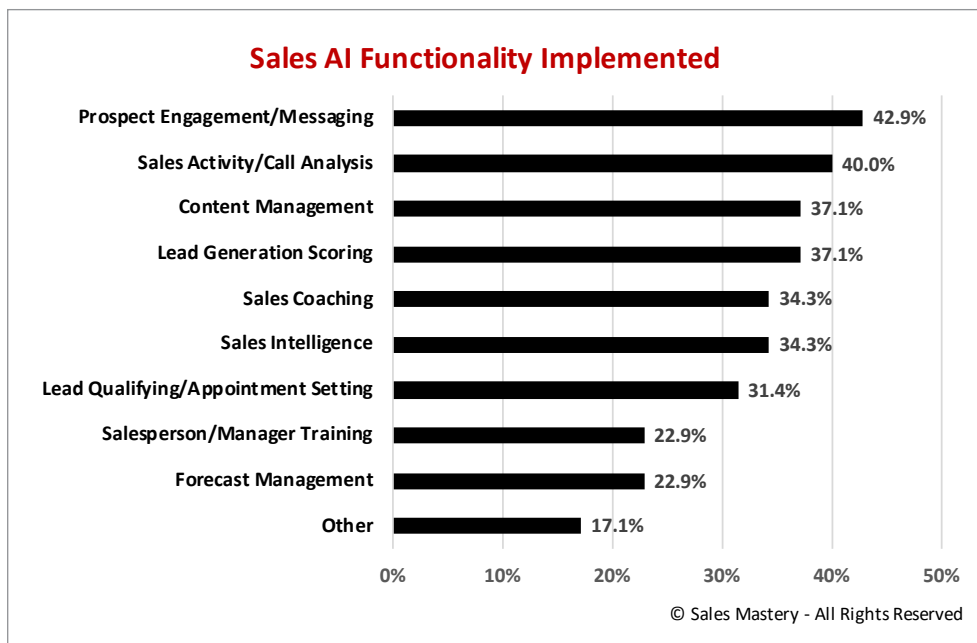
Looking at the chart, though, the most compelling item on the list for me is "Other." The excitement around generative AI is quickly coalescing into new concepts for how to use AI as a thought partner to collaborate and cocreate in ways we could never imagine before. Those concepts are being turned into solutions that skilled business professionals can easily leverage. And in the world of sales, those solutions are already demonstrating new ways of redefining and reinventing major aspects of customer lifetime management that will set the stage for turning how a company sells into a sustainable competitive advantage.

At a recent sales executive forum, I was on panel that was asked to comment how the sales AI space has evolved over the past five years, from the embryonic stage to right at the doorstep of ubiquitous usage. We each were then asked to summarize our view on what sales AI will do going forward.

I choose to paraphrase an observation that Rob Thomas, COO of IBM, made about AI for business in general, but adapted his thoughts to the world of sales: "AI might not replace traditional salespeople, but sales professionals who use AI will definitely replace those who do not." 🤖

Jim Dickie is a research fellow for Sales Mastery, a research firm that specializes in benchmarking case study examples of how companies are leveraging technology to transform sales. He can be reached at jim@salesmastery.com or on X @jimdickie.

THE MOST COMPELLING ITEM ON THE LIST OF AI USES IS "OTHER."



Nostalgic for Nice

Remember kindness in customer service?

Many years ago, in the forgotten kingdom of kindness, there lived a friendly call center employee who, for some odd reason, answered the phone like she gave a damn.

Although it smacks of a fairy tale, this scenario did play out fairly regularly some years ago. These days, though, it's a different story.

Should an article about customer service really be a nostalgia piece?

THE IMPACT

It's easy to say, "This Gen Z-ish person behind the hotel's front desk does not want this job or, so it seems by her demeanor, *any* job." But if we're honest with ourselves, we know historically that the greatest impact on any generation is the one before it. So, what could I possibly have done to ruin Shelby and her outlook on humanity?

For starters, I probably taught her in kindergarten that life was fair and that she'd be responsible for fixing the ruined environment. I also told her everything that happened before 1995 was terrible and should never be repeated. Then I told her she could be

her own individual unique person, while also telling her that she could live with me forever and implying that growing up was kind of optional.

THE PROBLEM

So the problems that we have with people who didn't grow up in a customer service culture is that we (and by "we," I mean people who often cannot control the volume on our iPhones) positioned them to struggle to provide the service that we now so impatiently expect.

Fast-forward to the present day, and Shelby stands behind the hotel front desk, seemingly uninterested in the guests checking in. The echoes of our teachings of self-care and "me time" reverberate in her head. And this goes beyond Shelby; it's a generational phenomenon. The values we instilled, the contradictions we presented, are now rearing their disrespectful heads.

THE CONFLICT

Customer service has evolved over the years, transitioning from a simple transactional interaction with a smile to a Ritz-Carlton-style white-glove service. But there was always a high expectation of what customer service was supposed to be. Come to think of it, what white gloves really do well is detect dirt! So maybe the high standard we have aspired to was destined to end in disappointment.

It feels that friendly customer service is now a distant memory, replaced by a hurried, digital world where personal connections often take a backseat to doing what it says on your screen, even if it makes actual humans miserable. Shelby and her peers, armed with a conflicting upbringing, find themselves navigating this complex terrain.

THE APPROACH

The concept of customer service culture is pivotal in understanding the dynamics at play. It's not merely a set of rules or a script to be followed; it's a belief system, a way of approaching interactions with an empathetic and often sympathetic eye for what people need in the moment.

People of any generation understand this intuitively, but somewhere along the way, the essence got lost in translation. And when I say translation, I'm not talking about a generational language barrier involving Gen Z terms like "that slaps" (it's good) or "that's mid" (it doesn't slap); it's the idea that someone who doesn't know you could understand the efficiency you're providing to them even though you have no detectible level of caring.

As I ponder Shelby's lackluster approach, I can't help but reflect on my role in shaping her worldview. Did my well-intentioned advice or potentially offensive dad jokes inadvertently contribute to the decline of customer service standards? Have we, as a society, failed to pass on the importance of genuine connection and service excellence?

THE "S" WORD

The problem extends beyond individual actions; it's (I'm going to use the "S" word now) systemic. The educational system, parenting styles, and societal norms all play a role in shaping attitudes toward customer service. Perhaps we didn't emphasize enough the value of putting oneself in the customer's shoes, of treating others the way we would like to be treated. People can't really give to others what they were never exposed to.

To address this, we must go beyond blaming the younger



generation and take responsibility for the culture we've collectively fostered. (These days, "fostered" is often code for "screwed up.") Organizations need to invest in comprehensive training programs that not only teach the technicalities of the job but also instill a customer-centric mindset. The forgotten kingdom of kindness didn't crumble overnight from an attack outside castle walls; it eroded gradually from within.

THE DIFFERENCE

Moreover, redefining success for the newer generations is crucial. It's not just about personal achievements; it's about contributing positively to the community, be it through excellent customer service or other acts of kindness. Success should be synonymous with making a difference in the lives of others. If this sounds like I am getting on my soapbox (yes, I'm aware that Shelby doesn't really understand the origins of the soapbox metaphor), it is because I absolutely am.


THE SOAPBOX

As we strive to rebuild the customer service culture, let's acknowledge that change starts at home, in our schools, and within the family. Encouraging open conversations about the importance of service, empathy, and human connection can reshape the narrative for future generations. It's not about abandoning progress but rather infusing it with the timeless values that underpin exceptional customer service.

THE SACRIFICES

In conclusion, the tale of Shelby and the forgotten kingdom of kindness serves as a reminder that the legacy we leave behind shapes the world we inhabit. Nostalgia shouldn't be a lament for what's lost. It should be a call to action for what can be regained.

Conclusions like this one aren't terribly valuable if they don't also suggest what the call to action should be, so here I go bandying about another "S" word. A sacrifice will likely have to be made on both ends of the situation. Shelby will have to try to show more compassion one interaction at a time, and the customer will have to deal with her "service with a smirk" style for now as she improves.

Ultimately, this call to action boils down to willingness. If you are not prepared to sacrifice for what you want, what you want becomes the sacrifice. And let's be honest: what we all want is service from someone who doesn't leave us feeling as though the act of providing that service is causing them to lose the will to live. 

Garrison Wynn is a best-selling author and [personal influence advocate](#) who for the past 27 years has helped organizations create a culture of leadership, safety, service, and change. He has spoken on five continents to almost all the Fortune 500 and their industry associations.

NOSTALGIA SHOULD BE A CALL TO ACTION FOR WHAT CAN BE REGAINED.

Get Your **CONTENT** MARKETING on Track ... Or Get Left Behind.



By Theresa Cramer
ISBN 978-1-937290-06-1
208 pages • \$17.95

"Resistance may be futile as so-called 'digital natives' set trends and increase their purchasing power, but this good-natured book makes the pill a tad more palatable. After all, Cramer cautions publishers, 'If you're still resisting custom content, you're already years behind your customers.'"

—Kirkus Reviews

Marketers and brands are eager to cash in on the content marketing craze, but as Theresa Cramer points out, relatively few firms are doing it well. In fact, while a recent study shows that 90% of B2C marketers now have content marketing programs, just 34% rank their efforts to date as effective. In this book, Cramer's savvy guidance—drawn largely from incisive profiles and interviews with successful content marketers—demystifies the discipline and presents tactics and strategies that are working today. Cramer offers definitions and background, highlights minefields and misfires, and describes exciting new roles and opportunities for marketers, publishers, and journalists.

Inside Content Marketing is more than a how-to guide—it's an engaging, perceptive, and must-read business title for anyone who wants to make it in content marketing and thrive in the Age of Brand Journalism.

Look for *Inside Content Marketing* wherever books and ebooks are sold, or order direct from the publisher.

infotoday.com



Top 6 2024 Customer Experience Megatrends – What to Prioritize Now

In 2024, customer experience advantage is rapidly shifting to companies that recognize the opportunity to leap ahead with the convergence of digital, cloud, AI and advanced CX applications.

Consumers want fast, friction-free answers in the moment. Digital and self-service excellence is an absolute necessity for CX quality. Empowered employees are essential for handling complex customer situations. And AI can be the key to improving every aspect of the customer journey.

With these technologies, companies can dramatically improve customer loyalty and increase efficiency across every aspect of CX operations.

“The technology super wave of AI is revolutionizing CX, giving businesses an unprecedented boost to their business, uncovering areas for automation to empower employees and deliver proactive and humanlike self-service.”

– Barry Cooper, President, CX Division of NICE

Megatrend #1: Consumer loyalty disappearing

Companies cannot risk poor customer service for today’s always on consumers. In 2024, look to reduce customer effort everywhere you can! Start with customer needs first and make answers easy for them to find on your website or your mobile app. Then, look at ways to reduce effort for agents as well. Why? Because agents are key to making customer interactions feel connected and complete.

Follow these three priorities to reduce effort, boost convenience and create loyalty:

1. **Enable successful end-to-end self-service and digital journeys.** Always make it easy for customers to “transfer to an agent” when they have a more complex issue to resolve.
2. **Offer intelligent elevation by informing the agent of the context and request before the customer even gets to them.** Give agents real time knowledge and sentiment guidance with an AI-powered agent copilot as part of a unified agent desktop.
3. **Leverage the magic of agent time spent with customers by reducing after-call work.** AI-powered automated summaries save valuable time for the agent and free them to focus on delivering personalized service to the customer at hand.

Megatrend #2: CX complexity intensifying

The number of ways people can interact with brands is exploding across a rapidly growing number of touchpoints.

To establish a truly seamless customer journey, it is essential to integrate digital customer experience (CX) as a fundamental component of your comprehensive CX strategy, seamlessly woven into a unified cloud platform. This ensures that all customer touchpoints, spanning from websites and mobile apps to contact centers, are harmonious, connected, and free of disruptions.

Globally, organizations should put delivering the ultimate consumer experience at the top of their list. These three critical must-haves to achieve these objectives are imperative for lasting advantage:

1. **A unified interaction-centric platform** – Orchestrate 100% of interactions across all touchpoints, from voice and messaging, to chatbots and social media.
2. **Convergence of rich CX capabilities** – Bring everything together channels, applications, data, and knowledge, all enabled with prebuilt AI.
3. **AI purpose-built for CX** – Master scale and complexity with CX AI models trained on real CX data, not generic internet data.

Megatrend #3: CX initiatives at risk

As digital touchpoints have increased, and as many different departments work independently on CX initiatives, most organizations today find that they have disconnected point solutions and silos of customer data. Connecting and integrating those systems has grown increasingly difficult.

“Nearly every CX program we’ve studied has, over the years, accumulated unnecessary baggage that saps resources from more urgent and effective initiatives.”

– Forrester, Planning Guide 2024: Customer Experience

Customer-obsessed organizations are acting now by consolidating with a complete CX cloud platform and unified data. One multinational hospitality firm gained powerful interoperability by consolidating their tech stack and eliminating 11 disparate vendor solutions by replacing with NICE CXone.

To propel your CX initiatives into the future with digital and AI, you need a solid foundation that also delivers efficiency across your organization. Your journey begins here:

1. **Audit technology** across digital, marketing, sales, customer service, and contact center.
2. **Pinpoint essential sources** of customer data and assess connectors.
3. **Identify overlapping capabilities** and potential systems and data that can be consolidated.

4. **Consolidate** on a single CX cloud platform with the most complete set of required CX applications.

Megatrend #4: Digital transformation moves to the fast lane

Take a fresh look at your digital strategy. Digital customer experience (CX) initiatives have often operated in isolated silos and lacked cohesion, so customers have encountered fragmented journeys. 2024 is the year to upgrade CX technology and leverage new digital, self-service, and AI applications.

Brands and organizations that use data to personalize recommendations, content, products, and services based on their own preferences and behaviors are best prepared for these heightened customer expectations.

Proactive engagement that's personalized should be initiated beyond traditional voice, SMS, and email, and extend to broader channels and search engines to increase its effectiveness.

Make personalized answers on channels of choice, such as website FAQs and help docs, SEO enhanced—so people don't need to dig for the knowledge you have readily available for them.

Now is the time to emphasize digital and self-service excellence with these action steps:

1. **Conduct a 360-degree appraisal** of current digital and self-service channels.
2. **Detect areas for improvement** within the website and mobile app user experience.
3. **Incorporate chatbots and virtual assistants** for routine tasks.
4. **Optimize self-service channels** for user-friendliness and comprehensive resolution.

Megatrend #5: Making self-service more intelligent with AI

Along with the increase in digital interactions, there is a substantial rise in customer expectations for organizations to resolve more inquiries through self-service. Yet the delivery of that option still hasn't lived up to the promise.

Organizations are employing chatbots that only resolve a fraction of interactions. That's because the bots are built on datasets not focused specifically on CX or they're manually created using a narrative approach where humans simply guess which phrases customers might use to express intents. This approach is reactive, time-consuming, and inaccurate because it limits learning capacity and requires manual updates. The result is poor outcomes and decreased customer satisfaction, as well as higher costs as customers are forced to talk to an agent.

Bots need to be much more than just simple tools that automatically shuffle limited responses from a set of pre-written answers that aren't helping customers. They need to be in

touch with the reality of what customers are truly thinking and what they really want (i.e., the voice of the customer). How? By implementing a data-driven approach that takes insights from millions of live agent-assisted interactions to consistently improve self-service answers and resolutions.

Take the guesswork out of self-service development with purpose-built AI models as part of NICE Enlighten that identify customer intents, training phrases, and problem-solving activities that ensure success. Armed with superior data and insights, organizations can simplify CX to make journeys more delightful and seamless by making self-service brilliantly human.

Leveraging over two decades of expertise and billions of conversations, Enlighten empowers businesses to construct optimal self-service applications utilizing conversational data and futuristic AI. Moreover, Enlighten harnesses the world's most massive syndicated live interaction dataset from previous interactions, thereby optimizing future self-help experiences.

Megatrend #6: AI accelerating CX transformation

Artificial intelligence is a force multiplier transforming every aspect of customer experience starting with self-service, extending to customer service agents, and uncovering critical insights for CX leaders faster than before possible. By harnessing the transformative potential of AI, businesses can proactively address customer concerns, predict their requirements, and provide tailored solutions, to solidify a foundation of trust and reliability.

With AI at the top of investment priorities, organizations should prioritize getting it right! Consider these high-priority use cases that are ready to roll now with AI models and applications purpose-built for CX from NICE.

- **Self-service automation** of routine customer service tasks
- **AI-powered routing** matching customers' needs and intents to the best agents
- **Advanced agent assistance** for CSAT with real-time sentiment and knowledge guidance
- **Automation** of after call work and interaction summaries
- **AI-enabled decision-making tools** to pinpoint the best improvement opportunities

CX is in a pivotal moment where AI is serving as a catalyst for exceptional customer experience—but only for those who have the right technology in place. In the year ahead, adopting the latest CX technology in digital, AI, analytics, workforce engagement and voice of the customer will streamline operations and prioritize excellent customer experience.

Understanding—and taking action—on these top six CX megatrends are essential to pull ahead of competitors in the race to differentiate your brand and build business value in 2024.

www.NICE.com

Contact Centers Add Technology but Still Fall Short

CCW Digital finds that CX technologies have not changed CX delivery

Companies have discussed the need to improve the customer experience for some time, but in 2023 they continued to fail to deliver on that promise, according to a report from CCW Digital.

“For all the talk about competing on the customer experience, all the hype over the transformative potential of AI, and all the excitement over predictive intelligence, today’s experiences remain reactive, generic, inefficient, and unwelcoming,” CCW Digital concluded in its latest contact center report.

Less than 15 percent of consumers feel that companies are sufficiently personalizing customer interactions, according to study author Brian Cantor, managing director of CCW Digital’s customer management practice digital division. “The majority continue to endure long wait times on the phone while remaining wholly underwhelmed by AI-driven chatbots. Nearly 60 percent are facing undue difficulty getting refunds or make-goods when things go wrong.”

Only 4 percent of consumers think CX improved in 2023, according to the report.

“The typical customer experience has remained fragmented, inefficient, and inconsistent, and arguably even worsened, in the years since omnichannel became a popular term,” Cantor maintains. “By finally beginning to unify their channels, however, brands move closer to creating predictive, personalized, seamless customer journeys that foster long-term loyalty.”

Employee experience at contact centers also remains challenging, despite improvements that companies think they’ve made, according to Cantor.

A full 84 percent of contact center leaders think they markedly improved their approach to agent engagement over the past year. Other noteworthy improvement areas, according to the report, included collaboration with other departments (70 percent), cost management (70 percent), and omnichannel engagement (66 percent).

As part of their employee training efforts, contact center leaders plan to prioritize empathy and soft skills, complex product mastery, and personal career development. More than half (52 percent) expect to be able to increase employee retention in the coming years. Additionally, contact center leaders are most optimistic in their ability to better empower agents, reduce wait times, and strengthen proactive engagement.

Cantor adds that contact center leaders expect to empower agents to easily access the data and knowledge they need to deliver exceptional support. More than 41 percent feel this statement will definitely be true of their contact center in the next two years, while another 47 percent feel they will make some progress.

“Confidence in this goal is unsurprising given that agent training, knowledge management, and customer intelligence represent major investment priorities,” Cantor says.

Contact center technology continues to evolve, with contact centers investing in AI solutions, data protection, UX design, and case study evaluation, according to the report. “As web self-service becomes more prominent, contact center leaders will have to determine which issues are most suitable for chatbots to handle. Presently, the typical contact center leader is comfortable allowing customers to make appointments or process basic transactions in chatbots. There is less agreement, however, on whether these bots should be able to initiate account changes, issue refunds, or make exceptions to policies.”

Despite the advances in AI, web self-service, and other technologies, contact center leaders do not feel phone communication will fade away in the coming years.

Cantor adds that leading contact centers will continue to invest in innovation, even though 9 in 10 expect to undertake some cost-cutting measures in the next two years.

Nearly a third (31 percent) will make cuts across the board, while 34 percent will invest heavily in contact center operations but trim spending at the customer experience level. Roughly 23 percent will take the opposite approach, prioritizing customer experience while reducing internal costs.

“Contact center leaders can acknowledge their limitations,” Cantor says. “They can identify their solutions and priorities. They can account for complications and considerations. But the ultimate goal of these endeavors is not to win a participation trophy. It is not to show that they are taking customer- and agent-centricity seriously. It is to create a more robust, empowering, customer-centric operation. It is to create a contact center that is better in the future than it is in the present or was in the past.” —Phillip Britt





Marketers Need Transparency with Consumer Data

PCH finds consumers are increasingly concerned with data privacy

With data breaches seemingly becoming a daily occurrence, most consumers are more concerned about their privacy than ever, according to research from Publishers Clearing House (PCH) Consumer Insights.

Nearly 6 in 10 (58 percent) of respondents will stop interacting with companies that have bad reputations around data, and 52 percent are willing to stop using companies that don't provide an option not to track personal data, the survey said.

"When consumers were asked what they consider to be personal data, they overwhelmingly indicated that all of their data is considered personal," PCH Consumer Insights says in a whitepaper detailing the research. "This tells us that for any category, including voice patterns, emails, calendar appointments, and more, consumers consider this information to be personal."

Consumers are most concerned about the privacy of their bank information, according to the report, with 89 percent citing bank data as personal. Bank data was followed by health information (cited by 85 percent), phone numbers (85 percent), home addresses (84 percent), and online credit card purchases (83 percent). Also topping 80 percent were locations, email addresses, and fingerprints.

"The data economy is all-encompassing in Americans' lives. It impacts everything we do," the report adds.

Thirty-eight percent of those surveyed said they never want to share their data, while only 2 percent said they would do so in exchange for knowing about new products and services.

"People are beginning to think of their data as an asset, something that they own," the report says. "Marketplace trends point to shifting power away from corporations and into people's hands as they seek to educate themselves and control their own data."

Companies relying on CRM data should pay close attention to consumer privacy concerns, PCH Consumer Insights says. "People expect companies to protect their personal information and data and are willing to take action against those that don't. The Cambridge Analytica data breach, for example, not only exploited people's data, it tarnished Facebook's brand."

That breach, in turn, likely contributed to the failure of products like Facebook's Portal, according to PCH. Portal wanted users to use a Facebook camera in their homes.

Whitepaper co-author Tiffany Johnson, who founded Xente Data and teaches at New York University, advises marketers to ensure that they offer

consumers choice and transparency in the collection and use of first-party data.

"This will allow them to rethink their data strategy to make sure that they hear from their loyal customers," Johnson says. She adds that marketers shouldn't hound consumers with retargeted ads and marketing.

"That actually saves you money," Johnson explains, noting that trying to retarget prospects who have shown little or no interest offers little, if any, return. "They can rethink their digital strategy for how they will use their data to further their business and not waste as much money."

Marketers should also explain to consumers why they are collecting the data, which will help consumers be more "data-literate," adds research co-author Daniela Molta, assistant professor of digital advertising at Syracuse University's S.I. Newhouse School of Communications.

"People really need to reassess their data strategies because it's good for business," Molta says, adding that companies should go beyond the disclosures required by law to be extremely transparent with their data methods and uses.

Other recommendations in the whitepaper include the following:

- As consumers seek to educate themselves and control their own data, the power of data protection is shifting away from businesses and into the hands of consumers—and marketers need to adapt.
- A lack of education about data security is a societal issue that works against marketing goals and erodes consumer trust, so data literacy needs to start in kindergarten and continue to be taught throughout a person's life, including in the workplace.
- Data literacy issues will be exacerbated by the continued proliferation of AI. Americans already struggle to understand how their data is used in business and advertising practices, so it's likely they're even more unaware of how their data is being used to train AI models. —Phillip Britt

A Look Ahead at CRM in 2024

Industry players share their thoughts about what lies ahead for sales, marketing, and customer service

Just slightly more than a year after the release of ChatGPT, no one can deny the impact that generative artificial intelligence has had on the CRM industry. AI is not just table stakes right now; going forward, it will be absolutely necessary for vendors and end users to be competitive. In the following pages, dozens of industry insiders lay out their vision for the CRM industry in 2024, highlighting the technologies and strategies that will be important into the new year. (For more predictions, visit destinationcrm.com/Insight.)

GenAI hype will crystallize into reality ...

“In 2023, the world got hit by the ChatGPT storm, and the hype was huge around its capabilities and what it meant to the support world. We saw opportunities for operational efficiencies, automation of redundant tasks, and improvements on the overall experience. As we head into 2024, companies will continue their exploration of how this technology will be implemented in support organizations across multiple use cases. We will see more and more live use cases, largely for agent assistance, as concerns of removing the human in the loop to validate generated content linger.”

—Patrick Martin, chief customer officer and general manager of service at Coveo

“Generative AI dominated 2023, and for good reason. It’s one of the most transformative technological innovations of our time, with the potential to upend entire industries and how we work. But what started out as a mad dash for organizations to adopt generative AI at all costs has started to shift into adoption methodologies that are more strategic. I expect that trend to continue into 2024.”

—Eric Williamson, chief marketing officer of CallMiner



... and AI use cases will expand.

“Generative AI will enable content creation at scale, bringing with it both benefits and challenges. Marketers are used to generating a wealth of content when pulling together a campaign. Generative AI will take this to an unprecedented level, pumping out numerous permutations of copy and imagery that can be assessed by the marketing team. This will open up the possibility to scale personalized one-on-one engagements with consumers like never before.”

—Tara DeZao, product marketing director of advertising and marketing technology at Pegasystems

“By the end of 2024, the top salesperson in most companies will be an AI. These digital sales agents will have negotiated multimillion dollar deals, leaving traditional sales methods obsolete. The sales development/business development/inside sales representative function will be eliminated, and, yes, replaced by AI.”

—Jim Kaskade, CEO of Conversica

“In 2024, conversational AI will witness a groundbreaking shift from natural language understanding technology to generative AI. While NLU bots initially seemed promising, their

limitations, and particularly the cost of deployment and maintenance, have become very apparent. The focus will shift toward deeper integration of large language models into conversational AI, dramatically improving customer satisfaction while at the same time decreasing downtime to deploy and greatly improving total cost of operation.”

—Max Lipovetsky, chief product officer of Cyara

“Generative AI is showing the potential to transform the customer experience in profound ways, and in 2024 the most thoughtful contact center leaders will move from reactive customer support to proactive relationship building through frictionless and personalized experiences that are delivered 24/7. At the same, customers will adopt their own genAI tools to engage with companies and their contact centers. Contact center leaders must be prepared for these new customer-driven automated interactions. Truly harnessing the power of AI will require driving change and adapting new customer behaviors, but the payoff in customer satisfaction and loyalty make it a necessary evolution.”

—Pasquale DiMaio, vice president of Amazon Connect at Amazon Web Services

“AI will give consumers a highly personalized single point of contact for all inquiries, serving as an ‘AI butler’ capable of dealing with multiple requests across different platforms and businesses. This will break down one of the major frictions in customer service: siloed interactions with brands necessitating multiple phone calls and putting undue strain on contact centers. The AI butler will allow customers to schedule a car appointment, swap out their new shoes for a different size, and inquire about an insurance issue during one seamless, interconnected interaction.”

—Barry Cooper, president of the CX Division at NICE

Privacy and security concerns will persist.

“AI vs. customer privacy discussions will lead to a stalemate in 2024. You really

can't advance one without setting back the other."

—*Blaine Britten, senior vice president of data strategy at Stirista*

"Resolving identities are increasingly important going into 2024. Recognizing that multiple customer emails belong to the same person or are in the same household and accurately linking that identity to physical or offline identities will help organizations to consolidate their CRMs with a comprehensive view of their customers and drive better customer experiences across channels."

—*Tom Burke, CEO of AtData*

"The year 2024 is when CX leaders will make the leap toward increased adoption of passwordless authentication to not only safeguard business but meet customers' heightened demands related to convenience and security. Traditional passwords will only lead to more frustrated customers; a truly seamless CX experience requires getting rid of the old-fashioned password altogether."

—*Peter Barker, chief product officer of Ping Identity*

The year will mark the dawn of conversational commerce and the rise of virtual agent avatars.

"Conversational commerce will become more prevalent in 2024. It won't replace other methods of commerce, given online shopping's complexity and the diverse needs of the market, but it will enhance shopper experience and sales. The fusion of visual AI models and large language models will enable personalization and recommendations to help users find similar products and improve their online shopping journeys. Merchants must tightly integrate conversational commerce with vector search technologies to produce specific results that drive conversions. If executed well, conversational commerce will empower customers to engage with brands on a more personalized level, which will be a huge step forward for e-commerce."

—*Zohar Gilad, CEO of Fast Simon*

"The emergence of social commerce has revolutionized how individuals connect with their communities and make purchasing decisions. Social media platforms have evolved into vibrant hubs where people not only discover products but also witness the purchases of others within their social circles. This dynamic environment fosters deeper customer engagement and profoundly influences retail trends and gift-giving norms. In order to reach new customers in 2024, the e-commerce industry must foster community and a higher level of engagement through social commerce."

—*Peter Imburg, CEO of Elfster*

"Contacting customer service via video chat is steadily increasing in popularity. With staffing shortages and increased demand for the channel, organizations will turn to virtual agent avatars to help manage incoming video service requests. Like digital and voice bots, these avatars will help automate the early stages of customer engagement. From providing information, to solving simple issues, to connecting the customer with a human agent best equipped to handle their needs, these avatars will improve the level of service consumers experience via video."

—*Mike Szilagyi, general manager of product management at Genesys*

We'll see the emergence of new measurement methodologies.

"The more that brands and media agencies come to realize that the vast majority of the open web is becoming ID-less, more user-centric measurement approaches, such as attention, will become increasingly important. Brands will need to flip their thinking on how they evaluate performance. In fact, in this new ID-less environment, attention metrics will enable advertisers to go beyond static metrics such as click-through rate. They'll instead be able to gauge how a specific ad placement is able to capture the attention of the users, providing insight into user behavior, preferences, and receptiveness to ads."

—*Giles Rekruciak, platform director at Adlook*

"Brand loyalty will be the most important factor of consumer behavior in 2024. As a consumer, if I have fewer dollars to spend and I need to make choices on where to shop, I'm going to gravitate toward the brands I've purchased and was satisfied with in the past. People may also not be as willing to take a chance on new brands. Economic strains are really going to separate the great brands from the mediocre ones, so doubling down on efforts to build customer loyalty will be paramount for staying ahead."

—*Andy MacMillan, CEO of UserTesting*

Cloud migration will intensify.

"The customer service industry's slow migration to the cloud will accelerate in 2024 as organizations look to take advantage of the flexibility, scalability, and security of digital platforms and hyperscalers. Technologies like AI and automation are a forcing function that will motivate this move as leaders seek to create more intelligent, connected, and transparent end-to-end experiences for agents and customers. The push to the cloud will also give organizations better ways to integrate systems more deeply throughout the organization to reduce time to resolution, improve service operations, and drive customer satisfaction and loyalty."

—*Michael Ramsey, vice president of product management for customer workflow products at ServiceNow*

During a recent installment of the CRM Playaz webcast, executives from 10 leading CRM vendors emphasized how critical AI will be going forward, both for vendors and end users.

The 10-member panel discussions, spread out over two days in December, agreed that AI will be embedded into all tasks and processes in 2024. AI, they said, would enable companies to break down silos, consolidate data, predict outcomes, and increase productivity among sales, marketing, and customer service teams.

For a more detailed view of the commentary, click [here](#). And for the full program, click [here](#) for the Thursday (12/7) session; and [here](#) for the Friday (12/8) session.

Trust Is Invaluable in B2B Sales

Trusted companies garner twice as many recommendations, Forrester finds



Many businesses discount the value of trust in sales to other businesses, even though it is an essential element that often determines purchase intent, according to a new report from Forrester Research.

“Business leaders often struggle to understand how to create trust, how it influences the buyer decision process, and what are its components,” the research firm concludes. “Nothing could be further from the truth. Trust is a prime determinant of business success.”

A Forrester survey showed that business buyers who trust a company are more than twice as likely to recommend that company to others or pay a premium to work with that company.

But what defines trust? According to Forrester, B2B trust involves the following seven elements:

1. **Accountability:** The confidence that a company provides satisfactory reasons for its words, decisions, and actions and is ready to bear the consequences for them.
2. **Competence:** The recognition of a company and belief that its expertise enables it to do something successfully or efficiently.
3. **Consistency:** The expectation that a company will always behave or perform in a similar way. This enables individuals (those with business buying capabilities or influence) to confidently rely on that expected behavior or performance in their own plans, actions, and assumptions.
4. **Dependability:** The expectation that a company will be available and reliable, while also being able to meet the business’ current needs and expectations.
5. **Empathy:** The perception that a company is emotionally connected to its customers, employees, and partners, while also understanding and sharing their feelings and experiences.
6. **Integrity:** The belief that a company acts honestly and

according to values that individuals can easily recognize and that those values permeate the entire company.

7. **Transparency:** The perception that a company conducts business in an open way while also making every effort to share information about the business based on accurate, verifiable facts.

“In the real world, buyers must balance the relative importance of each trust lever in a particular situation,” Forrester says in the report. When trust level scores are plotted on a 100-point scale, buyers place the most value on competence, consistency, and dependability.

Other findings from the report include the following:

- **Business buyers sort the trust levers into two groups.** Competency, consistency, and dependability are in the primary group. The levers in the secondary group almost always have the lowest share of importance and negative utility scores. Accountability is the one trust lever that straddles the two groups. Forrester recommends that businesses consider these trust groups in driving their brand activation programs.
- **Primary levers carry the most weight.** But the secondary levers shouldn’t be ignored. In Forrester’s Business Trust Survey, nearly half (45 percent) of business buyers reported that they aren’t likely to forgive a business that didn’t act in accordance with their company’s values.
- **Business buyers view trust differently than consumers.** Business buyers have a clear sense of which factors drive the vendors from whom they are considering purchases. While the trust levers for business buyers are consistent across business types and geographies, consumer trust rankings vary widely.
- **In North America, 30 percent, 17 percent, and 19 percent of B2B business buyers rank competence, consistency, and dependability as the most important levers of trust** across industries, purchase contexts, and buyer ranks, respectively.
- **Regulated industries often value all trust levers evenly.** Trust lever utility score differences for industries like financial services, insurance, and healthcare are consistently smaller than other industries, indicating a more evenly distributed spread with less extreme favorites.
- **Risk-tolerant buyers globally deem competence (53 percent), consistency (33 percent), and dependability (28 percent) highly important while giving the lowest ranking to empathy.** As business group size and complexity grows, so does the importance of competence. The more complex a buying scenario, the less empathy matters.

—Phillip Britt

REQUIRED READING

The Key to Selling More Is Selling Nothing

Salespeople need to talk less and listen more

Sales coach and trainer Joe Pallo claims to have developed an approach that has helped hundreds of top sellers double or triple their production without spending more time at work. Called the EARNING system, Pallo spells it out in his new book, *How to Sell Nothing: The Logical Way to Make the Emotional Sale*. In the following interview with CRM editor Leonard Klie, Pallo offers a logical blueprint for making the emotional sale by first creating the relationship.

CRM: You say in the book that salespeople today talk too much and don't listen to customers or prospects. Why do you think that is the case?

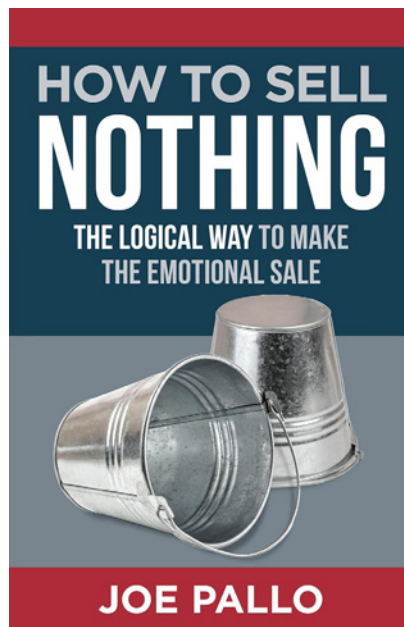
Pallo: If you ask most salespeople, they will all admit that they have all talked past the sale. Personally, I believe that whoever is talking is buying. In a selling situation, if I am talking more than you, I am literally buying your objections. We need to get prospects talking. Doctors can't treat a medical problem until the patient tells them what's wrong, and I can't sell you until you tell me what's wrong or how and why to fix it.

“One of the biggest complaints prospects have with sales is that no one listens to them.”

You say the answer for this problem is for salespeople to sell nothing. How does that work?

There are two sales that need to be made: the logical and the emotional.

Both are important, but the logical sale confirms the sale, the emotional sale makes it happen. We need to sell to what prospects want (the logical piece), but most important, to why they want it (the emotional piece).



You advocate for salespeople to repeat back what the prospect said? Why is that important, and how does it translate into closing the deal?

One of the biggest complaints prospects have with sales is that no one listens to them. When you take the time to listen to someone and repeat back what was said, it does the following:

- It shows that you listened/cared.
- It confirms the message.
- It gets them to think, “I like this guy. He gets me.”

Mentally, it gets you on the same side of the table before you even start selling.

In the book, you propose the EARNING system. What are the seven steps in this system, and can you briefly explain each of these?

E = Evaluate the prospect's current reality, gathering the data.

A = Advantages, finding out what prospects like about their current vendor or situation. In this step, prospects are telling me their hot buttons, what I need to close on.

R = Revise. What do prospects want to change? This is the major reason they will go forward.,

N = No. Who can say “no” to the next step? This looks at whether I have the decision makers in the room.

I = Interpret back. Repeat what the prospect said. This is a huge piece.

N = Nothing. Ask the prospect what will happen if nothing changes. This creates a sense of urgency.

G = Gain. This looks at the pay value if the prospect's issue is fixed or resolved.

You encourage salespeople to focus on building emotional relationships. How can they do this?

What people want is important, but *why* they want it is extremely important. I strive to never speak, teach, sell, or coach until people tell me what they want and why they want it. Then I simply sell that.

What is the one message you want readers to take away from this book?

It is easier to sell what prospects want to buy vs. what you want to sell. Our job as salespeople is to take the time to allow prospects to say not only what they want but why they want it, and then sell that. It takes all the ickiness away from sales and allows you to close with confidence.



Expect GenAI to Take on Customer-Facing Roles

As large language models expand and generative AI technology advances, experts see a greater role in customer service

BY PHILLIP BRITT

Large language models (LLMs), the underlying technology behind generative artificial intelligence, are helping make contact centers much more efficient. But at this point in time, they are not being used to their full potential. Today, most contact centers are using LLMs internally to help agents perform their jobs more efficiently and provide customers with faster, more comprehensive service, but they have yet to turn them around for customer-facing use cases. That could change very soon—quite possibly even in 2024, experts agree.

Advances in generative AI for customer service are developing rapidly, according to Simon Thorpe, director of global product marketing for customer service and sales automation at Pegasystems. “Large language models being able to create more humanlike interactions through the self-service channel is a partnership made in heaven. This is something that will come very quickly,” he says.

Research from Zendesk backs that up. The company, in its most recent customer experience trends report, revealed that 65 percent of business leaders believe the AI they use is becoming more natural and humanlike and it’s only going to get better.

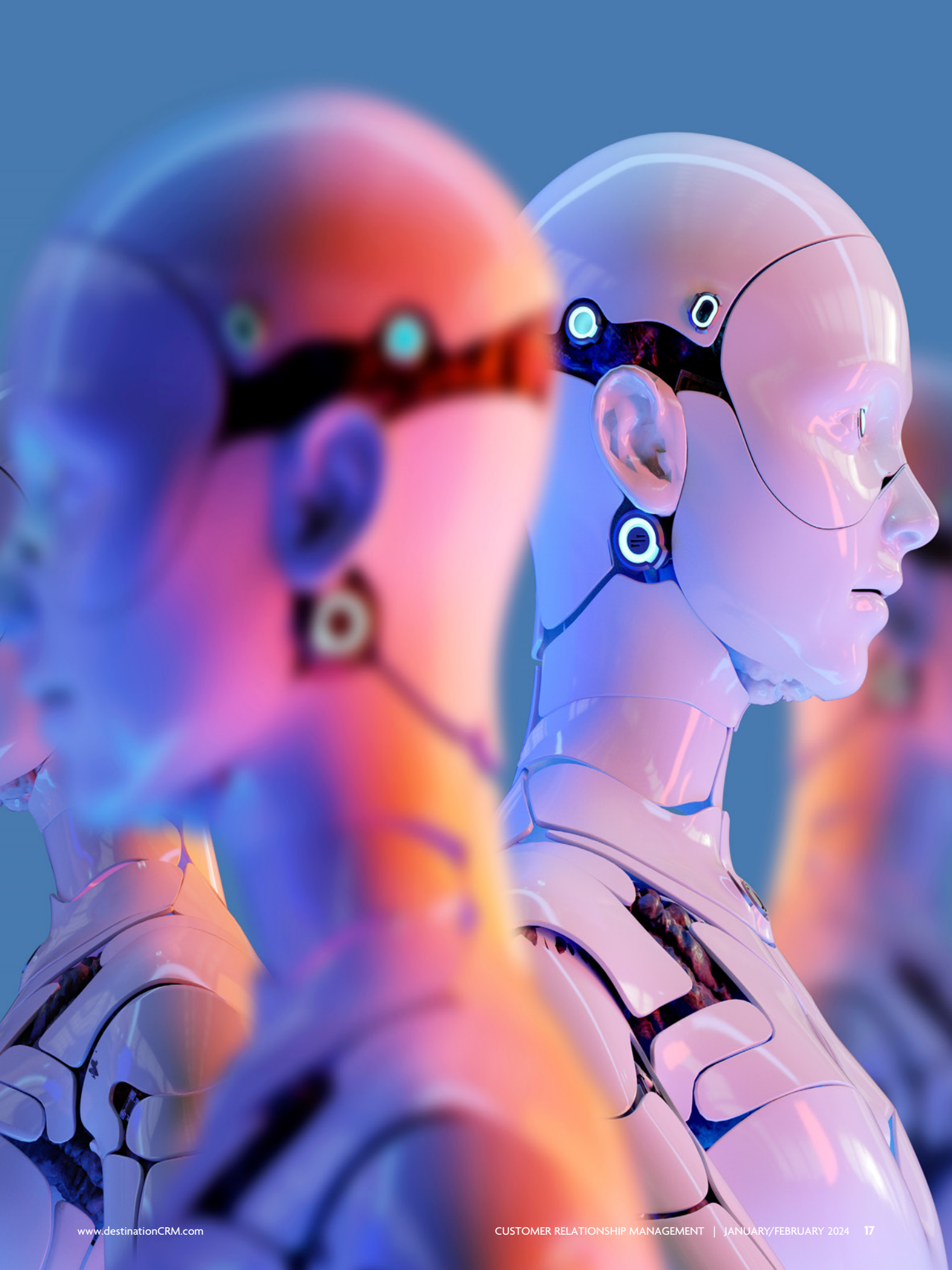
“It’s less about when the technology will be ready and more about when organizations become ready, coupled with how broad of a problem scope genAI is given freedom to handle,” says Aaron Schroeder, director of AI solutions at TTEC Digital.

Today genAI is limited, “but that boundary keeps creeping further and further as the rapid innovation in the space continues and as companies leverage partners that specialize in AI and CX,” Schroeder says.

LLMs can be ready for much more extensive use in customer-facing applications when there is a clearly defined use case grounded in strategy, business objective alignment, adoption planning, defined measures of success, and risk mitigation/security planning, he adds. “There’s a nuance between when something is ready for use and when something is ready for value derivation. Bright and shiny object syndrome drives many organizations to only focus on the former.”

And customers are also ready for greater use of AI in customer service settings, Thorpe says, noting that most have indicated a preference for self-service for years, even as virtual assistant chatbots have been able to answer only the most basic questions. The expectation, he adds, is that generative AI-powered virtual assistants will be able to help with more detailed answers, though today that customer-facing capability is still very limited.







THE HALLUCINATION HOLDOUT

The reason genAI in customer service is limited, experts agree, is the same one that has been holding it back across other use cases: hallucinations.

Indeed, there is a concern with LLMs working more directly with customers because of these hallucinations, which occurs when the LLM perceives patterns or objects that are non-existent or imperceptible to human observers, creating outputs that are nonsensical or altogether inaccurate.

“Striking a balance between humanlike interaction and minimizing the likelihood of generating inaccurate data becomes a critical tradeoff,” McDougal cautions. “Hallucinations, wherein the AI fabricates responses, pose a considerable risk.”

“At this time, generative AI can be dangerous for customer-facing interactions because, by design, the technology doesn’t know yet how to say: ‘I don’t know,’” explains Yan Zhang, chief operating officer of PolyAI, which builds enterprise conversational assistants that carry on natural conversations with customers to solve their problems. “Since generative AI pulls information from the public internet, the answers it puts out may be misleading, or at worst wrong.”

“While generative AI can personalize customer engagement on a massive scale, our point of view is that AI shouldn’t sit in the driver’s seat,” adds Joe Bradley, chief scientist at LivePerson, a conversational AI systems provider. “Right now, it works best as a co-pilot that helps customers get where they need to go.”

LLMs currently fail with unanticipated scenarios, untrained data, or empathy-driven situations, says Rob McDougal, CEO of Upstream Works, a provider of omnichannel contact center software. “Though generative AI enhances chatbot interfaces and self-serve [interactive voice response] scripts, it necessitates carefully constrained responses, given the challenge of exhaustive training.”

There’s also brand risk if genAI hallucinates and provides incorrect feedback on a customer-facing solution, Schroeder adds.

Companies that have already deployed genAI-powered bots in some of their operations have had problems quantifying accuracy because there is no script, making it difficult to find areas of weakness, and there is a low tolerance for the risk of the bot giving wrong answers, adds Melissa Copeland, principal and founder of Blue Orbit Consulting.

Since genAI hasn’t been deployed as part of an overall customer journey or customer experience, its impact on customer satisfaction and customer behavior is also untested. The high degree of interest in deploying the technology means that organizations have to define test cases to understand how it works and be able to forecast investment, risk, and return more concretely.

Though no one can say for sure when genAI-powered bots can be successfully deployed for more general customer-facing

uses, Chris Johnson, CEO of Experience Dynamic, says the hallucination rate is dropping.

THE INSIDE TRACK

While experts agree that genAI’s role in customer service is currently limited to internal operations, there is a vast set of applications for the technology within that realm.

“The killer app around AI is more about helping agents do their jobs than it is around chatbots,” McDougal says.

“We’re already using generative AI to heavily guide and support agents,” Thorpe agrees. “They can summarize calls and summarize interactions. The benefits of that are exponential.”

GenAI is also being used in contact centers to develop workflows, call scripts, routing patterns, personas, and much more.

Some companies are also using generative AI to work directly with agents to provide coaching, using guidance provided by previous customer interactions, says Frank Schneider, a vice president and AI evangelist at Verint.

This coaching can include upsell recommendations that sound more natural and have less of a hard-sell tone than is typically used, according to Schneider.

Additionally, for onboarding and agent training, genAI helps provide customer interaction examples based on data generated from real-life use cases. Zendesk AI, for example, is built on billions of real customer service interactions and understands customer experience, taking the guesswork away from agents so they can focus on providing an excellent experience, according to Cristina Fonesca, vice president of product at Zendesk.

Another way contact centers are deploying genAI today is to create no-code AI assistants out of existing customer service policies and procedures, LivePerson’s Bradley points out. Such bots can quickly provide customers with detailed, natural responses. However, these bots need to be created to address specific questions and to resolve specific issues. They also must be continuously monitored by human agents.

And even though the use is limited, experts also point out that customer experience operations are already by far more advanced in deploying LLMs and genAI than other business units, having moved past the public relations and early hype phases and into the implementation stage to improve agent performance, streamline workflows, and ensure that each customer interaction is unique and personalized.

“Some of the big contact center vendors are including generative AI as part of what they are providing. Zoom is doing it. Cisco is doing it,” McDougal says. “But what they are doing is still constrained.”

BIG PLANS

Going forward, there are big expectations for how genAI will help improve customer service, especially with regard to chatbots.

“We’re already using generative AI to heavily guide and support agents.”



Chatbots powered by genAI can speak and understand human language and use LLMs to match brand personas and share the right resources needed based on previous interactions, according to Fonseca.

Thorpe expects LLMs to eventually enable companies to train virtual assistants and chatbots to be able to provide not only responses to direct questions, but also predictions, actions, and resolutions.

“If we get to the point that customers are actually adopting this service, it will make customers happier and it will make enterprise brands happier because costs will go down,” Thorpe says. “Costs will go down because companies using the technology, once the hallucination issue is solved, will be able to handle more interactions with fewer human customer service representatives.”

And then, for contact center chatbots, generative AI represents progress from scripted models, enabling more natural conversations, according to McDougal.

Yaniv Hakim, cofounder and CEO of CommBox, expects chatbots to move from an inconvenience to an enabler once genAI advancements take hold. “Today’s chatbots often leave customers frustrated. However, advancements in generative AI are transforming chatbots into valuable tools which can provide personalized support around the clock and resolve issues instantly, leading to increased customer satisfaction and lower operational costs for businesses,” he says.

Among the advances under way that could have the biggest impact on the customer service space is retrieval-augmented generation (RAG). RAG technology enhances genAI’s ability to capture specific company information.

Imagine a future where AI bots seamlessly understand and engage with users like they were their best friends. RAG technology is the key to making this vision a reality, according to Nikola Mrkšić, co-founder and CEO of PolyAI.

“By combining the language prowess of AI with real-world knowledge, RAG revolutionizes customer interactions. It goes beyond conventional chatbots by personalizing engagements, boosting efficiency, and even predicting customer needs before they articulate them,” he explains.

“What sets RAG apart is its analytical capability. It doesn’t just chat; it proactively analyzes data, anticipating potential issues and offering support before customers even realize they need it. This proactive approach not only builds trust but also strengthens relationships by preventing problems before they arise,” Mrkšić continues.

RAG, he says further, “has the potential to be a game changer in the customer experience landscape.”

However, before deploying generative AI for external or internal uses, organizations need to start with a clear experience vision, aligned to business objectives. Then they can

identify where applying generative AI makes the most sense, according to TTEC Digital’s Schroeder. “The technology enables the strategy. With that philosophy in mind, we’d recommend isolating three core areas for evaluation: people, process, and design.”

Also add data to that list. Michael Lawder, chief experience officer of ASAPP, a provider of genAI solutions for contact centers, places it at the forefront.

“To implement AI into their CX stack in 2024, enterprises must establish foundational building blocks, such as high-quality transcription, and get their data house in order before they can really take advantage of the benefits of AI,” he states.

Chris Gladwin, CEO and co-founder of Ocient, a hyperscale data analytics solution provider, agrees. “The value of AI depends on the quality of its training data, and extracting


maximum value from multimillion-dollar AI investments is challenging without systems and architectures designed for massive data processing,” he maintains. “Companies that will be leading with the transformative power of AI in 2024 will be those investing in hyperscale architecture as a strategic cornerstone vs. a plug-in solution, and I expect we’ll start seeing a significant shift in the AI landscape as more and more businesses adopt this approach.”

Experience Dynamic’s Johnson suggests a simple experiment as a starting point: Load a PDF with a set of non-confidential customer service information, using OpenAI’s GPT chat builder. “Though doing so won’t create a bot ready for public use, it would provide a company with a sense of how helpful and accurate such a bot would be,” he says.

“Larger organizations with access to software development teams could take this a bit further and build a simple chatbot that uses customer service information and the OpenAI API to provide more nuanced interactions,” Johnson adds.

They could even explore integration with internal systems to deliver a more useful customer experience once the tech is finally available. But such capability is likely to take months to develop.

“In the not-to-distant future, [genAI] will be an incredible advancement that can be leveraged in direct customer service. Until then, it is worth experimenting internally with the technology to prepare your company for when it eventually arrives, as these platforms are easily accessible and inexpensive to use,” Johnson says.

“This is the time to act,” Thorpe states emphatically. “I fully expect [additional] use cases to start getting deployed very, very quickly.” 

Retrieval-augmented generation “has the potential to be a game changer in the customer experience landscape.”

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Here's how
to integrate
generative
AI into your
marketing
operations
without
ripping
out what's
already there

BY LINDA
POPHAL

Tips for Adding GenAI to Your Martech Stack



Over the years marketers have come to rely on many different types of technology to perform a wide range of tasks, from collecting customer data to communicating with customers, from creating and distributing content to identifying and nurturing leads, tracking campaign success, and much more.

Now, with the introduction of generative artificial intelligence technologies like OpenAI's ChatGPT, Google's Bard, IBM's WatsonX, and Salesforce's Einstein GPT, the use of technology is exploding even more rapidly in the marketing realm, having a ripple effect.

Martech stacks, by their very nature, grow, evolve, and change over time as new technologies emerge and older technologies become obsolete or are replaced. These impacts have accelerated with the introduction of a wide range of genAI tools and applications.

It's a rapidly changing environment for marketers, but most are embracing the new opportunities genAI brings and eagerly seeking ways to integrate the technology into their existing martech stacks.

A recent survey by Canva found that marketing and creative leaders are very optimistic about the potential this new

technology holds. In fact, 97 percent of the 4,000 people surveyed said they are comfortable with the rise of genAI, and 75 percent said it is already an essential part of their creative toolkits. Additionally, 80 percent believe these tools can help reduce the time required for repetitive tasks so they can focus on more creative aspects of their jobs; 69 percent said the tools are enhancing their teams' creativity. They're also realizing time savings, with 65 percent saying they're saving two to three hours per week and 36 percent saying they are saving four to five hours per week.

Only 17 percent said that genAI is limiting team creativity; the most common objection, cited by 48 percent of participants, was that the tools prevented the development of original ideas.

A more looming challenge, though, is the sheer size of the genAI landscape. The AI ecosystem is fragmented and complex, and marketers are feeling the pinch, as the following survey results demonstrate:

- 69 percent feel there are already too many genAI tools;
- 65 percent are overwhelmed by the learning curve;
- 54 percent feel pressured to use genAI and keep pace with change; and
- 47 percent say they don't know how to get the most value out of this technology.



Still, most are using these tools to a large degree to transform the content creation process—83 percent have used genAI to create written content, 82 percent to create unique images, and 82 percent to edit images and videos.

“GenAI holds immense power to upgrade your marketing campaigns, as it can help write captivating content, optimize ad campaigns, and do much more,” says Alex Horsman, head of marketing at Ammo.com, an online gun ammunition retailer. “But the key with genAI is integrating it into existing tech and blending it in without major disruptions. Instead of viewing genAI as a competitor, view it as a collaborator that is not out to replace your existing tools but to work alongside them.”

Here we take a look at some important steps and considerations for marketers as they consider how to integrate genAI into their existing martech stacks.

TAKING STOCK OF THE STACK

An important first step is cataloging or creating an inventory of the technology that is already in place. This might sound easier than it is. Technology has a way of proliferating over time, and not all technology is sanctioned by the IT department. The practice of shadow IT has grown significantly with the rise of cloud-based services and the consumerization of IT,

“Instead of viewing genAI as a competitor, view it as a collaborator that is not out to replace your existing tools but to work alongside them.”

where users have become comfortable downloading and using apps and services from the cloud to assist them in their work.

As Steven Bailey, commercial excellence leader of Ernst & Young Americas, notes, a first step for organizations thinking about integrating genAI into their martech stack is to “get newfound clarity in the marketing stack they have, which may often be a series of point solutions across different owners that suffer from a lack of integration or reliable data and content sources.”

Identifying what currently exists, how it’s used, who owns it, and which redundancies might exist can be an important starting point, requiring discussions between various stakeholders and alignment with organizational objectives and priorities.

Justyna Dzikowska, head of marketing at Brand24, provider of an AI-powered social listening tool, says she “had to learn that integrating genAI into an existing marketing technology stack requires a strategic approach that complements and enhances current tools rather than replacing them.”

Once there is a clear understanding of the technology that currently exists and how it’s being used, gaps as well as new applications can be determined.

“Be clear on what capabilities your organization needs for incorporating genAI, whether it’s improving customer segmentation, automating content creation, enhancing personalization, or optimizing ad targeting,” Bailey advises.

Importantly, don’t start with the tool or the tech; start with the desired functionality.

Doing this, Dzikowska says, ensures that genAI solutions will work synergistically with existing tools.

Jon Morgan, CEO and editor in chief of business consulting firm Venture Smarter, recommends looking for genAI tools that integrate seamlessly with the existing tech stack. “Many genAI platforms offer [application programming interfaces] or other integration options that allow you to connect them seamlessly with your existing marketing tools,” he says. “This makes it easy to flow data and insights between systems and avoid data silos.”

Part of this process also involves anticipating potential needs and applications, says Jonathan Moran, head of martech solutions marketing at SAS. “While we wait for martech vendors to fully develop genAI capabilities within their solutions that go beyond content assistance, we can start thinking about *how* to integrate the capabilities of genAI from a process (customer engagement), technical (how it’s done without a full rip and replace), and cultural (how it impacts marketing teams and talent) perspective,” he says.

The integration of genAI, Moran points out, will fundamentally change how marketers work and collaborate. “Gone are the days of slow, manual marketing workflows that may rely on single-threaded copywriters, editors, and designers.” With genAI, he adds, marketing workflows will become more streamlined, and “as we move into 2024 and beyond, generative AI will expand its reach to ultimately suggest complete marketing strategies and associated journeys for customers.”

It’s important for marketers to understand that they’re dealing with both uncertainty and ambiguity and to give themselves and their teams permission to try new things, experiment. and, sometimes, regroup.

BABY STEPS AND ITERATIONS

“The best genAI integration into martech is a flexible one,” Moran states further. “Because different genAI providers offer different supporting [large language models] with varying levels of parameters, the best approach is to work with more than one provider, grabbing the best from each provider.”

To do so, he continues, “a flexible connection framework must exist within a martech solution to connect via API to these genAI providers.”

A marketing use case, Moran says, might work best with genAI support from OpenAI, Google, and Amazon—all in combination—vs. just relying on, say, OpenAI.

There are no tried-and-true solutions or one-size-fits-all applications. Each marketing organization will need to explore and experiment, experts agree.

Bailey recommends implementing genAI incrementally and



testing rigorously “to allow teams to adapt while minimizing the risk of major disruptions while building capability.” A mindset of continuous improvement, he says, is important.

Horsman agrees. “New technology can be exciting, and it might be tempting to adopt it whole, but instead, start small!” he advises. “At Ammo.com, we first started using genAI on a small scale for content creation and copywriting. We started with one platform and continually integrated more as we continued to gather confidence and experience.”

Venture Smarter’s Morgan encourages marketers to identify specific areas where genAI could add the most value, “like generating personalized marketing copy or automating basic

“It’s crucial for marketing teams to understand how to effectively use genAI tools.”

tasks.” This, he says, “allows you to experiment without disrupting your existing workflow and build your comfort level with the technology.”

Horsman also encourages marketers to be innovative, creative, and willing to try new things. “Businesses are different, and marketers should not be afraid to try possible ways to use genAI,” he says.

The capabilities of genAI go beyond social media management and content creation. So, he suggests, “as you slowly adopt it, run experiments and explore other ways you can leverage genAI.” At Ammo.com, he says, “after using it for content creation, we tried it for personalized campaigns, which did not disappoint.”

Marketers can leverage the value and power that today’s technology makes readily available to determine what’s working, what’s not, and where additional potential might exist. Data and analytics can be a critical component of this process.

“Data is the backbone for making marketing decisions,” Horsman says. “Luckily, genAI thrives on data. Use your existing system to collect, analyze, and provide accurate data that genAI can learn from. Also, analyze its performance regularly and its impact on your marketing efforts and identify potential areas that need improvement. Use this information to refine your strategy and optimize genAI’s effectiveness.”

Another critical part of the process is staff training. To learn how to use genAI tools and how to evaluate their effectiveness, marketers need resources to ensure they’re equipped to leverage everything that these tools have to offer.

Such training is key, Dzikowska says. “It’s crucial for marketing teams to understand how to effectively use genAI tools,” she says. “This involves regular training sessions and creating a culture of continuous learning and adaptation. As genAI evolves, so should the skillsets of the marketing team.”

But this isn’t the kind of legacy training characterized by a

sage on a stage. Getting up to speed to effectively use genAI for marketing requires collaboration, Morgan says. “Train your team on how to use genAI effectively and encourage them to collaborate with each other to get the most out of it. This will help ensure that you’re using the technology to its full potential and driving real results.”

That collaboration should include thinking about how to work differently and, in many cases, in a more simultaneous than linear manner, Moran suggests.

“Traditional marketing workflows—the work process needed to execute a marketing strategy or campaign—often include brief development, sign-offs, message development, creative design work, approval, and then ultimate execution,” Moran notes. All this is a linear process that has existed for a long time. “With generative AI, multiple design streams can be executed simultaneously. The result is a quicker time to market and a more productive and effective marketer.”


WHAT THE FUTURE MIGHT HOLD

Looking into his crystal ball, Don McGuire, chief marketing officer of Qualcomm, predicts that genAI will allow marketers to spend more time on strategy and less on repetitive day-to-day tasks, identify and reach more specific audiences, and generate entirely new output for highly personalized content via text, images, and videos.

That’s already happening to some degree. McGuire says, noting that genAI will “force an ethical reckoning in the marketing world, highlighting the need for human management of communications with the public and individual consumers.”

As Qualcomm brought genAI into its own marketing operations, McGuire says they’ve been seeing an increase in productivity, time-to-market, and efficiency. This, he says, allows his team to “spend more time on strategy and creative collaboration and less on time-consuming, repetitive tasks.” It’s not about replacing people, he says, but about “augmenting and enhancing their capabilities.”

So how are marketers integrating genAI into their martech stacks? In varied ways that are likely to evolve over time—quickly and continually.

The bottom line is that this integration is a process, not a single event. There is no final state. GenAI and other technologies are continually evolving, and companies’ needs will as well. Today’s marketing landscape, from a technology and particularly a genAI perspective, is more about what could be than what is. And while there are no definitive answers at this point, many creative minds are exploring the possibilities and potential. 

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How to Pick the Best LLM for Your Sales Activities

With so many options in a fragmented market, it's important to choose wisely

BY PHILLIP
BRITT

Since the introduction of OpenAI's ChatGPT a little more than a year ago, large language models have captured the imagination of sales professionals, who are eager to see how generative artificial intelligence could simplify their workflows and relieve them of some of the mundane tasks that take up the time they could use for actively selling.

In just a short amount of time, genAI and LLM options have grown extensively. The major LLMs—ChatGPT, Google's Bard, Microsoft's Bing Chat, Meta's Llama, Salesforce's Einstein GPT, Anthropic's Claude 2—are all serious competitors in the space. Or some really ambitious companies might even try to build their own LLMs, combining their own technology with some foundational components from these other companies. With that many choices, how do you know which one is right for you or within which applications to deploy them?

The best LLM for sales? It depends, experts agree.

First, sales executives need to determine how the LLM will be used for sales, says Frank Schneider, vice president and AI evangelist at Verint. The LLM might be used to generate creative content for email blasts, for product descriptions, or some other sales-related need.

Different LLMs might work better with a particular company's data and systems, so experiment to see which integrates best, Schneider recommends. "A lot of it is going to depend on where I work. If I'm at a Microsoft shop and use lots of Microsoft products, you're probably going to lean toward [Microsoft's Copilot]."

Similarly, if Google or Salesforce products make up the bulk of the technology stack, that company's LLM is likely to be the preferred choice, Schneider says. "It comes down to cost, accuracy, performance, speed, and data security on some level."





For companies that don't lean to one particular technology vendor, Schneider recommends that sales leaders examine Hugging Face, an open-source platform where the machine learning community collaborates on models, datasets, and applications.

The Hugging Face platform is helpful because LLMs are evolving quickly. In early December, for example, Google launched its latest large language model, Gemini. Google executives see the new LLM as a huge leap ahead, eventually impacting practically all of its products.

Other LLMs are evolving as well, Schneider points out. "Right now, there is no best of breed. The best of breed is in the eyes of the beholder."

One LLM might perform better for some tasks, while another will excel at others, so the right LLM for one organization's sales strategies can be very different from the right one for a different organization with a different sales strategy, he adds.

The LLMs are becoming a platform, Schneider says. "The apps are spinning on the edges, but you're going to see a lot of collaboration on this technology. Instead of having a bunch of point solutions, you're going to start to see a suite of solutions centered on an LLM as a foundation."

DON'T BE HASTY

With the rush to add LLMs, sales executives might move too quickly for fear of being left behind, Schneider cautions.

Determine the potential sales uses for the technology, then prioritize them, Schneider recommends. Then plan training and policies for use of the technology.

Before choosing any LLM, you need to be clear on your sales strategy, says Kevin Raybon, founder of Phacyt Advisors, a consultancy to help go-to-market teams with their tech investments. "Otherwise, you're putting the technology before the sales. That's the problem that we have fallen victim to for years: We see a vendor who is coming to us with features, functions, and new technologies. We jump on board, sometimes without even knowing what it is and how the capabilities are going to help us reach our goals. When I talk to people about the technology, I'm not going to talk about it from the LLM level. We're going to start at the strategy level. We're going to think about the challenges you have today and your go-to-market strategy."

After discerning those answers, it's time to determine which LLM, if any, will help reach those goals, according to Raybon.

Different companies have different organizational structures, Raybon adds. Some organizations make sales responsible for heightening awareness about products and services. That responsibility falls to marketing at other organizations.

Similarly, other organizations might make their decisions

based on which LLMs they think would be best at capturing, compressing, and reporting meaningful information about their market, competitors, etc., to give salespeople a competitive advantage.

Experts agree that before selecting any LLM or multiple LLMs for different types of tasks, sales needs to consult with IT. LLM technology is still in its infancy, and any choice can be foundational for the company if the choice is correct.

"Large language models on their own are useless without a robust technology strategy for proper governance, implementation, and use cases," agrees Peter van der Putten, director of Pegasystems' AI lab. "ChatGPT, BingChat, Bard, etc., are all consumer products. Enterprise AI will use the same models that sit underneath—GPT-3.5 or GPT-4 for ChatGPT and Bing, PaLM for Bard, etc.—but the enterprise AI experience will be very different. It won't be a free-form chatbot, but instead, generative AI will be built into very specific business processes and customer journeys and interactions."

For that reason, van der Putten says that whether going with an emerging LLM or a more established one, companies should pay particular attention to the technology's governance and compliance attributes.

Use cases also cannot be ignored, he suggests.

For example, a salesperson could use generative AI to automatically summarize client conversations from diverse points of view, van der Putten adds. The technology will extract sentiments and topics and formulate clear, tangible calls to action, such as suggesting top executives as email targets. Sales managers will get autogenerated status reports around opportunities, accounts, or entire portfolios, based on sellers' activity, as well as inbound emails or marketing activity and response. There will be no need to type in prompts or interpret model responses.

This will all be fully automated, and generative AI will pull in relevant knowledge and data to formulate plans and courses of action, van der Putten says.

In this scenario, the underlying foundation model, whether it is GPT, PaLM, Meta's Llama 2, or something else, will become a commodity, according to van der Putten. "You actually want to abstract away from which service is being used and be able to switch services in the back end seamlessly based on quality, cost, and governance, without affecting any of the front-end experiences."

He adds that a salesperson will typically use an LLM to determine the best wording for vital emails to prospects and customers; an upper-level sales executive, meanwhile, is more likely to use the technology to summarize trends across different sales portfolios. So salespeople and executives might prefer different LLMs.

With that in mind and with the evolution of various LLM

"Right now, there is no best of breed. The best of breed is in the eyes of the beholder."



offerings, there is no single best choice, according to Raybon, who likens the current state of LLMs to that of computing in the early 1980s, when different solutions took turns as No.1 as they evolved at different rates.

COMPARING THE LLMs

Most experts agree that building an LLM from scratch is a risky and unnecessary process. Zac Sprackett, chief technology officer of SugarCRM, for example, calls it “a big mistake.” “The barrier to entry is low. There are partners out there who can help companies get the most value out of an LLM so that they can focus on their business.”

So if it's better to rely on a third-party system, which one is better? There is no easy answer, according to the experts.

“ChatGPT captured a lot of people's attention because it was the first to wrap a great user interface around the large language model, and [OpenAI was] bold enough to put it out in front of people, warts and all, and let it capture people's hearts and minds,” Sprackett says.

ChatGPT has advanced from where it was a year ago, with better tools, better ability to pull the most recent information from the web, and the ability to grab information via APIs, according to Sprackett.

ChatGPT also offers multimodal capabilities, as it can now evaluate and generate images as well as text, Sprackett adds. However, Google's latest advance could add similar capabilities.

Keeping in mind that the different models are adding new capabilities at different rates, Akkio, an AI company that delivers generative analytics and machine learning to businesses, recently benchmarked ChatGPT and Anthropic's Claude 2. Among its findings were the following:

- GPT-4 scored in the 93rd percentile in reading comprehension while Claude 2 reached the 86th percentile.
- Claude 2 outperformed GPT-4 in analytical writing, scoring in the 96th percentile compared to 89th for GPT-4.
- Claude 2 achieved 88 percent accuracy in math vs 83 percent for GPT-4.
- Claude 2 scored 71 percent on the Codex HumanEval Python exam compared to 67 percent for GPT-4, meaning that Claude 2 can generate code more accurately.
- GPT-4 edged out Claude 2 in common sense reasoning, with 83 percent accuracy vs. 82 percent.
- GPT-4 showed a better understanding of nuance and ambiguity in language.

Sprackett and others maintain that LLMs coming from CRM providers will provide the added benefit of being able to pull information—including customer interactions, lead generation sales success, customer support details, etc.—directly from those systems without requiring a lot of additional integration and coding work.

“ChatGPT, Google, and others don't have that kind of customer-level detail, and they're not going to be able to produce it,” Sprackett says. “For a business that has a CRM system, having access to all of that data and using it in conjunction with large language models is critical for generating responses that aren't generic, that are unique and tailored to your specific business and the way that you support your customers and the products and services that you deliver.”

SWITCHING LLMs

There is one major caveat when it comes to choosing the right LLM: After your sales organization determines how it will use an LLM, conducts its due diligence, consults with IT and with other experts inside and outside of the company, and then chooses and starts using one LLM, another might advance ahead in terms of usability and benefits. If that happens, switching from one to another is relatively easy for peripheral uses of the technology, according to Sprackett.

But if a company has LLMs integrated with APIs, it becomes a more complex transition.


Sprackett says that SugarCRM enables companies to switch from one LLM to another and to use different LLMs for different purposes.

Sprackett added that the advancement of LLMs in sales and related industries is also producing a cottage industry of prompt engineers—people who are well trained and experienced in structuring queries to elicit the best responses from LLMs.

“Not everybody should have to be a prompt engineer to get all of the value from a large language model,” Sprackett says. “Our responsibility as a vendor is to gather all of the relevant information that will produce the best possible response and assemble it behind the curtain so that the end user doesn't have to.”

An example would be using the LLM to gather and summarize all relevant customer information for a quarterly consultation with that customer.

“It's our job as a vendor to pull together all of those different data sources and ensure that they are available for the creation of that crisp answer,” Sprackett says.

And at the end of the day, there is one last caveat that will, and rightly should, impact any and all LLM decisions: Some new LLMs are likely to emerge, and there is likely to be some consolidation in the industry as well, van der Putten cautions. “There will be a lot more companies in production with large-scale generative AI. In a year or 18 months from now, I'm sure that the back-end ecosystem will be in flux. I don't think that will settle anytime soon.” 

“Not everybody should have to be a prompt engineer to get all of the value from a large language model.”

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Go Flooring's Sales Hit the Ceiling

Roomvo's Visualizer tool helped Go Flooring exceed \$12 million in sales in its first year

Starting a new business is challenging. Having it succeed is even more challenging, with the U.S. Bureau of Labor Statistics showing that 20 percent of new businesses fail within the first two years, 45 percent during the first five years, and 65 percent during the first 10 years.

But Go Flooring, which sells and installs hardwood, tile, carpet, laminate, and vinyl flooring from locations in North Carolina and Georgia, not only beat those odds, it rang up \$12 million in sales in its first year. The company was founded by Kenny Klinger in October 2022.

While there were a lot of factors in the company's first-year success, Klinger credits a lot of it to the Roomvo Visualizer, which Go Flooring uses to enable shoppers to see how flooring options would look in their homes. Roomvo, a Leap Tools company, has been extremely successful in converting prospects into customers, Klinger says.

While Go Flooring has showrooms at its retail locations and also sends salespeople armed with samples to prospects' homes, it's not the same as a customer being able to see how the flooring will actually look upon installation, according to Klinger.

"When we were looking to start our company, we looked at the large [flooring] manufacturers, like Shaw Industries and Mohawk. They had this technology," Klinger says.

Roomvo's Visualizer technology en-

ables shoppers to upload their own photos or choose from pre-selected rooms to see their flooring choices come to life in a real room scene. Visualizer automatically detects lighting, shadows,



product variations, and more for the most realistic results possible.

Rather than having prospects use the visualization technology from one of the manufacturers, Klinger thought it would be better for Go Flooring's salespeople to be able to use it when discussing flooring with prospects. This would enable customers to consider flooring from different manufacturers rather than just a single one.

"We wanted to manage it ourselves with the variety of products that we are offering to the consumer," Klinger says. "We took it upon ourselves to partner with Roomvo."

Klinger chose Roomvo because the company was already working with Shaw, Mohawk, and other top manufacturers that Go Flooring carries. "It was a clear and obvious choice. And [the technology] integrated with ours. We were able to plug their API directly into our website and quoting platform so that we

can show the customer how the flooring would look in their home as we are quoting them. Some of the other applications wouldn't allow you to switch as easily from one product to another or be able to change the angle," he says. "Roomvo offered us the full functionality that we wanted.

"We came to market with the technology understanding how it was going to benefit us and our customers in making decisions. From day one, having that available has certainly accelerated our growth," Klinger adds.

In addition to the \$12 million in sales, Go Flooring has achieved profit margins

"We came to market with the technology understanding how it was going to benefit us and our customers in making decisions."

in excess of 20 percent. Roomvo also helped Go Flooring achieve a demo-to-close ratio higher than 30 percent, according to Klinger.

He hopes to expand Go Flooring's success with Roomvo and other marketing strategies in 2024 and beyond. Among his considerations is the ability for customers to take their own pictures of rooms and upload them into Visualizer. Though Roomvo has offered that capability for years, Go Flooring has yet to turn it on. "This will help build excitement," Klinger states. —Phillip Britt

the payoff

ROOMVO'S VISUALIZER HELPED GO FLOORING ACHIEVE THE FOLLOWING IN ITS FIRST YEAR OF BUSINESS:

- \$12 million in sales;
- a demo-to-close rate above 30 percent; and
- profit margins in excess of 20 percent.

Qualtrics Helps Dow Unlock \$300 Million in Value

Insights from Qualtrics helped Dow boost customer satisfaction and digital transactions

Dow is a renowned 125-year-old materials science company with a portfolio of plastics, industrial intermediates, coatings, and silicones for customers in high-growth market segments, such as packaging, infrastructure, mobility, and consumer applications. The Michigan-based company operates manufacturing sites in 31 countries and employs approximately 37,800 people. Dow delivered sales of approximately \$57 billion in 2022.

For B2B organizations like Dow, the customer is often made up of multiple stakeholders, each with different titles, areas of expertise, locations, and decision-making power. Sales typically require the buy-in of many stakeholders over a longer period of time than typical B2C sales.

Dow has a stated mission of being the most innovative, customer-centric, inclusive, and sustainable materials science company in the world. But it also had significant challenges collecting and acting on customers' needs and preferences given that it had no centralized customer experience teams or common customer experience measures across the enterprise.

That all changed when it adopted Qualtrics' XM for Customer Frontlines digital module as part of a digital transformation that has generated \$300 million in value and a 20 percent improvement in customer satisfaction scores.

"In the experience economy, the brands that win and continue to stay at the forefront are those that listen to their customers and improve processes across every critical interaction," said Sachin Goregaoker, chief product officer

of XM for Customer Frontlines. "We are proud to help Dow realize its goal to make every customer interaction easy, enjoyable, and effective with a data-led enterprise-wide CX strategy."



XM for Customer Frontlines enabled Dow to ask questions of multiple customers to understand the unique needs of each one. Dow used customizable data displays to quickly analyze and publish key results internally, increasing transparency across the organization and enabling it to measure how the customer experience progressed over time.

Dow compared these insights with operational and financial metrics, like on-time delivery, product availability, and revenue growth, to reveal meaningful correlations and opportunities for improvement. These insights informed targeted changes to the customer journey, including the addition of shipment visibility and tracking capabilities, upgrades to order placement experiences, and structural changes and new tools that enhanced supply, demand, and inventory management.

Using Qualtrics Digital CX and the Qualtrics XM Institute CX Maturity

assessment, Dow also identified opportunities to improve its online and digital properties with new formulation visualization and predictive modeling tools. This led to a 450 percent increase in repeat visitors to its digital commerce platform, an increase of new leads generated via digital engagement from 5 percent to 65 percent, and a more than 200 percent increase in digital orders.

By layering company operational metrics on top of experience data gathered using Qualtrics, Dow found that satisfaction and buying behavior are significantly influenced by product availability at the time of order placement. This provided new insight into how to balance the benefits of higher inventory levels vs. higher cash flow. Armed with these insights, Dow invested in integrated planning and inventory optimization technologies, resulting in lower inventory levels without compromising customer experience. Dow reduced inventory volume by 7 percent, equivalent to more than \$1 billion in cash flow, all while improving customer confidence in product availability by 10 percent and the CX score by 8.5 percent.

"We see Qualtrics as the central enabling platform that helped us design, build, and then confidently prioritize and enhance our CX best practices over time," said Riccardo Portal, global director for CX at Dow. "From the early days of our journey, Qualtrics solutions have allowed us to rationalize and monetize our CX disciplines to unlock new value for our customers and for Dow."

the payoff

USING QUALTRICS' XM FOR CUSTOMER FRONTLINES, DOW HAS SEEN THE FOLLOWING RESULTS:

- \$300 million in additional value;
- a 20 percent improvement in customer satisfaction scores;
- a 450 percent increase in repeat visitors to its digital commerce platform;
- an increase from 5 percent to 65 percent in new leads generated via digital engagement; and
- a more than 200 percent increase in digital orders.

Thanks to AI, the CCaaS Sector Comes on Strong

Although sales cycles are slower, companies are buying

The contact center-as-a-service (CCaaS) market continues to thrive despite challenging macroeconomic conditions. The factors driving rapid growth include the recent adoption of these solutions by cloud holdouts, including large financial services institutions; ongoing seat expansions from many existing customers; a strong replacement cycle of earlier-generation CCaaS solutions; and increased international deployments. DMG Consulting estimates that CCaaS accounted for 28.9 percent of contact center seats as of the end of December 2022, a figure expected to have grown to 34.7 percent by the end of calendar year 2023.

Although lingering economic uncertainty has led to slower purchasing decisions for contact center technology, frequently doubling the typical sales cycle to 12 to 18 months, companies *are* buying. Some deployments, particularly in large financial services organizations, are implemented on a trial basis and delayed by the need for customizations and integrations. However, once a CCaaS platform proves its ability to reliably meet expectations, these firms are expanding their use of these solutions. DMG expects to see this trend continue, particularly now that the inclusion of artificial intelligence (AI) is influencing many technology acquisitions. CCaaS vendors are investing heavily in these capabilities, whereas

providers of on-premises contact center infrastructure are not.

Sales and technology partnerships have been key to the CCaaS market's success, a trend that DMG expects to increase. Indirect sales channels reduce margins for CCaaS providers, but they also significantly expand the providers' sales reach without requiring them

to add new employees to their payrolls. And when it comes to technology partnerships, given the rapid pace of innovation for AI, automation, and analytics, incorporating third-party systems and applications is a highly effective method to quickly bring new capabilities to market, giving customers additional flexibility in their solutions.

Platform security, reliability, scalability, and transparency have always been leading triggers for CCaaS users. While



there is still room for improvement, CCaaS providers are listening and responding to customer concerns. Several vendors now display real-time system status and historical availability on their websites, enabling customers and prospects to monitor the overall up-time performance of their cloud solutions. Many vendors also give clients the specific results for their own environments. CCaaS providers are using a combination of third-party data centers with built-in resiliency and redundancy and their own data centers to address sovereignty issues and meet the needs of their global public and private customers. As international regulatory compliance requirements become more complex, companies are turning to CCaaS vendors for assistance in addressing them.

PRACTICAL APPLICATIONS OF AI AND GENERATIVE AI

AI, including generative AI, is speeding up innovation in the CCaaS market. Leveraging these technologies in highly practical and useful ways delivers quantifiable benefits that improve productivity, self-service capabilities, and the customer and employee experience (CX/EX). Generative AI is jump-starting and reinvigorating many self-service initiatives, helping organizations automate tasks and activities that previously required live agents. AI is enabling companies to identify business functions that can be enhanced with automation, and generative AI is providing them with the methods to do so while vastly reducing implementation time and cost and increasing accuracy.

Generative AI boosts the ability of interaction (speech and text) analytics (IA) to identify customer trends and needs,

PLATFORM SECURITY, RELIABILITY, SCALABILITY, AND TRANSPARENCY HAVE ALWAYS BEEN LEADING TRIGGERS FOR CCAAS USERS.

positioning companies to be more responsive. These technologies are significantly improving the effectiveness and validity of analytics-enabled quality management (AQM) applications, paving the way for enterprises to migrate from manual quality management programs to the new age of automated QM. Generative AI is also relieving agents of post-interaction wrap-ups and summarizations, creating more accurate notations and follow-ups and doing so in less than half the time.

While still in its infancy, generative AI is already yielding measurable improvements for customers and employees. Along with other AI technologies, generative AI delivers agents better real-time guidance (RTG) functionality, enabling them to assist customers faster and more accurately. These capabilities are transformational for contact centers: They reduce transfers and the need to put customers on hold, two things consumers greatly dislike. Just as important, they improve the CX and productivity by speeding up resolutions.

AI's contributions will continue to grow as these technologies mature and additional resources become available to assist enterprises in organization-wide initiatives, particularly in contact centers and service departments. DMG expects to see CCaaS vendors deliver verticalized large language models (LLMs) that speed up implementation time frames, increase accuracy, and reduce risk so that companies can realize benefits more rapidly. These improvements will enable companies to scale operations and become less reliant on human agents. However, it will be many years, if ever, before they remove the need for live representatives.

WHAT'S NEXT FOR CCAAS?

Contact center technology innovation is taking place in the cloud, although not all organizations will move in this direction. The CCaaS market is highly fragmented, complex, and competitive, with more than 200 vendors. CCaaS has traditionally been considered the foundational technology in a contact center and is typically the first one companies select. Most CCaaS platforms include a few workforce engagement management (WEM) applications, which are provided natively or via partnerships. CCaaS vendors also typically partner to deliver CRM solutions and provide out-of-the-box integrations to leading competitors, although some include CRM-lite capabilities. Vendors currently offer a mix of pricing schemes, from traditional per-seat or per-month fees to various consumption models.

What's next for the CCaaS market? The answer is complex, as some vendors will continue down the current path, growing by expanding their base of contact center customers, while others will broaden their focus and sell outside the contact center to business functions that previously would have used a unified communication solution. These nontraditional seats will be less functionally rich (and less costly) than is needed

in a contact center; support fewer channels; require limited WEM applications; and often leverage collaboration tools like Teams. While the price for nontraditional seats will be significantly less than contact center offerings, winning them greatly increases the total addressable market (TAM) for CCaaS vendors.

DMG expects the CCaaS market to begin consolidating, particularly as some vendors run out of money. CCaaS platforms and CRM solutions, which are heavily interdependent, will continue to converge, and the likelihood of mergers and acquisitions across the two sectors is high. Larger CCaaS competitors are expected to double down on their traditional offerings by building out native AI capabilities while also making it easy for customers to bring their own AI. The addition of AI-based capabilities will enable vendors to increase their price per seat and/or usage fees, which is generally a highly lucrative approach. Additionally, DMG expects to see more activity from large tech companies—like Amazon, Google, and Salesforce—which will likely increase the pace of change in this segment.

FINAL THOUGHTS

The CCaaS market is executing well and is on track to continue its strong performance, despite today's unique economic environment. Leading (and some contending) vendors are expanding internationally and growing their network of sales and technology partners. CCaaS providers are also demonstrating a willingness to customize their platforms to win business from the large financial services organizations that are slowly migrating to the cloud.

The pace of innovation, primarily driven by investments in AI and automation, is introducing new features and functionalities that are helping companies enhance the CX and EX and increase productivity. The CCaaS market is positioned to grow rapidly during the next five years. It's already attracted vendors from many IT sectors, including a few big tech companies—Amazon, Google, and Salesforce—as well as notable players like Zendesk and Zoom. However, as the market matures and begins its next act, it will consolidate and transform, making it more important than ever for companies to select well-funded vendors that are investing heavily in the future. 

Donna Fluss, founder and president of DMG Consulting, provides a unique and unparalleled understanding of the people, processes, and technology that drive the strategic direction of the dynamic and rapidly transforming contact center and back-office markets. Fluss can be reached at donna.fluss@dmgconsult.com.

**LARGE TECH COMPANIES—
LIKE AMAZON, GOOGLE,
AND SALESFORCE—
WILL LIKELY INCREASE
THE PACE OF CHANGE
IN THIS SEGMENT.**

End Notes

Manifesting Better Customer Experiences

Three things I predict (hope?) will happen this year

AND JUST LIKE THAT—it's 2024 and we're back!

One of my favorite things to do at the beginning of the year is to think about what I'm putting on my customer service "bingo card" for the next 12 months. Some people might call these *predictions*, but I prefer to consider them my personal *manifestations*. So, get out your tarot cards and your crystals and let's take a journey together. These are three things I *hope* will come to pass in 2024:

We are entering the year of AI-augmented onboarding.

Surely you didn't think we'd get through one of these without mentioning generative AI? Not going to happen, friends. If 2023 was the year of generative AI hype, 2024 will be the year the rubber hits the road. While there are several interesting opportunities for genAI in the contact center, the one stealing my focus is agent training and onboarding. We all know that retention in the contact center is ... not where we want it to be. It's a tough job, and it's only getting harder as we automate all the easy stuff.

Did you know that for most chat agents, the first experience they have with their chat platform is when they are supporting their first live customer? *Yikes*. We need to do better than that. Some vendors are developing genAI applications that whisk agents into dynamic simulations, where they can hone their chat mastery in the exact software they'll use—with AI-generated customers. Hands-on learning that empowers agents to refine their skills without exposing customers to the learning curve? Love it.

Brands will look inward before orchestrating outward.

OK, full disclosure—I'm a bit of a tough critic when it comes to brand experiences. It's my job, after all. My biggest pet peeve, though? When brands have all the data they need to orchestrate a killer experience and ... they just can't get it together. For all the industry's talk about having a 360-degree view of the customer, it feels like companies should prioritize a 360-degree view of *how they engage with* the customer.

One company I spoke with a few weeks back had seven (!) different solutions for outbound messaging, each with different triggers, each managed by different teams, and with zero coordination between them. This is a symptom of a broader issue: The right hand doesn't know what the left hand is doing. Marketing teams spend untold sums trying to talk to customers more while the contact center is spending to *avoid* speaking

with those same customers. Something's not adding up here.

But I'm starting to see the beginnings of change. Companies are realizing that, wow, maybe we need to clean up our house if we want to give our customers the experiences they deserve (and expect). Making 2024 the year of brand introspection? Don't mind if I do!



Human authenticity will shine brightest.

Frequent flyers of this column will recognize this sentiment. We've talked about this before. OK fine—I've talked about this before, and you've indulged me.

Your customers' experiences with your agents *matter*—a lot. It's one of those make-or-break moments that we've all experienced. A contact center conversation that goes so badly that the company practically rolls out the red carpet to a competitor—or one that goes so well that the company just earned a customer for life.

We are going to see more companies launch customer-facing experiences with genAI this year (Forrester predicts half of large brands will experiment in this area in 2024). It's going to be a year of unprecedented automation in the contact center, and I love that for us. *But* we must be careful not to lose ourselves to the machines. Companies that master the art of strategically applying the human touch to the right customer moments will be the ones playing to win. 🤖

Christina McAllister is senior analyst, Forrester Research, covering customer service and contact center technology, strategy, and operations.

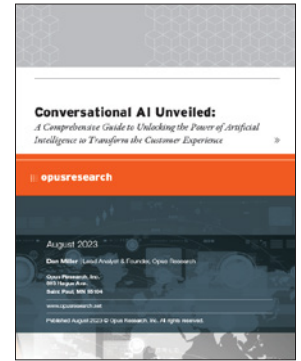
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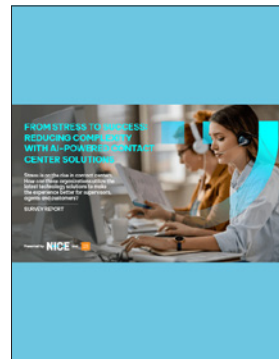
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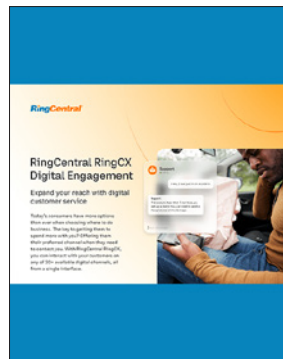
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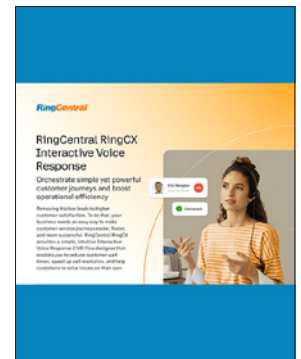
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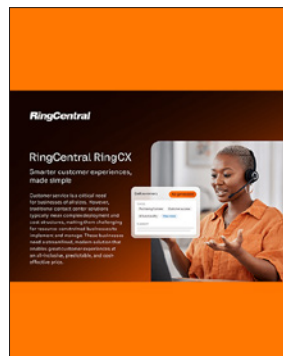
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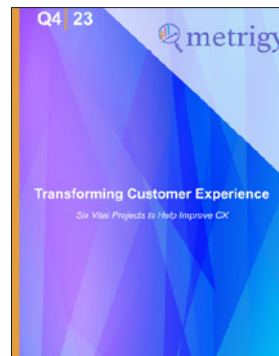
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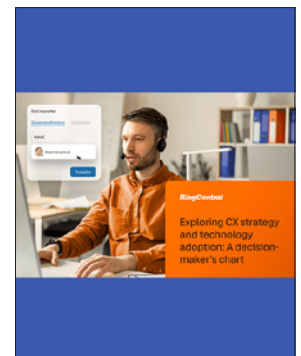
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