RESULTS. GUARANTEED.

Founded in 1986
Privately held

Over 400 professionals in
Canada, USA and EMEA

Balance between
Clients, Onliners and
Online

" We know that when great people, who
share a set of common values, work
together, they can accomplish great
things. "

– *Chuck Loewen*
President and Chief Executive
Officer

DIGITAL TRANSFORMATION

CYBERSECURITY

Digital Advisory
Services

Salesforce

Customer
Engagement

Digital
Studio

Service
Management

CX, AI & Data
Services

Advisory
Services

Cloud
Services

Assessment
Services

Technical
Security
Services

Organizational Change Management · Project Management · Quality Assurance · Cloud Deployment · Systems Integration · Application Development
Application Management Services · **CX, AI & Data Services**

CHRIS THERIAULT

- Over 20 years in the Contact Center consulting business.
- Experience with multiple cloud and premise based platforms
- Worked in various technical, sales support, operations, consulting and consulting practice operations roles

STEVEN HOLT

- 15+ years working in the Data & Analytics space, delivering on every aspect of Enterprise Data Warehouse and Advanced Analytics solutions, both On-Prem and in the Cloud.
- A member of the Innovation Lab and the Data Services team, passionate about all things Data, Web3, and GenAI.
- Spends time playing around with the available LLMs, trying to push their limits with advanced prompt engineering and creative data augmentation; Or sometimes just finding new and creative ways to make them break… 😉

THEORY & PRACTICE

Neural Network Conceived (1943)
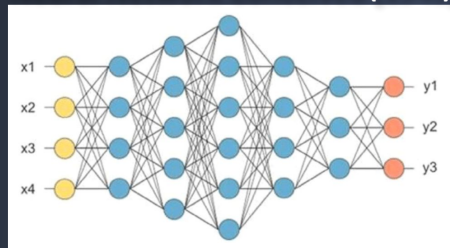
Deep Blue defeats G. Kasparov (1997)

Watson wins on Jeopardy! (2011)
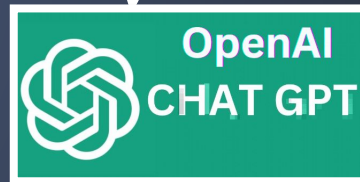
Birth of AI as a field (1956)

| 1943 | 1953 | 1963 | 1973 | 1983 | 1993 | 2003 | 2013 | 2023 |

AI Winter #1

AI Winter #2

COMPUTER
Player A

HUMAN RESPONDER
Player B
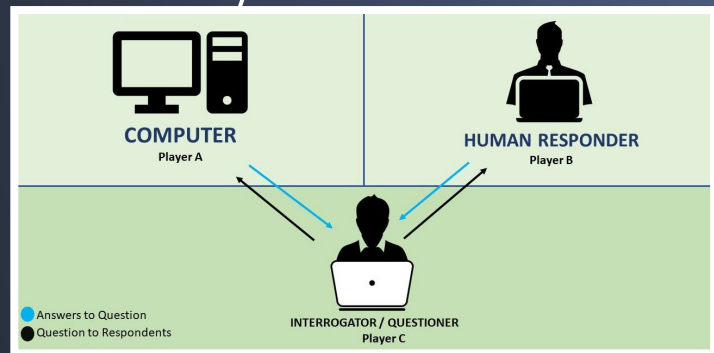
Backpropagation popularized (1986)

OpenAI CHAT GPT

- Answers to Question
- Question to Respondents

INTERROGATOR / QUESTIONER
Player C

Turing Test (1950)

Roomba introduced (2002)

OpenAI introduces:
1) GPT-2 (2018)
2) GPT-3 (2020)
3) GPT-4 (2023)

DEFINING AI

CREATE

AI can be custom built for a wide range of purposes. The majority of this is narrow in purpose, with recent general-purpose models being all the rage

CONSUME

AI can be something to directly interact with (wittingly or not) with widely available LLMs, like GPT-4, Llama2, or Gemini, significantly altering the landscape

INTEGRATE

AI can be a component within a wider spectrum of use cases, architected into an application or business process to (often) help within a decision-making process

online business systems

DATA AS A FOUNDATION FOR AI

—

1. **Data Preparation**

   Ensure your data is reliable and representative.

2. **Challenges**

   Your biggest challenge will be Corporate Culture

3. **Managing & Using Data**

   "There's an AI for that!"

USE CASE - HumanFirst

online

Unstructured Data

- Call center transcripts
- Chat transcripts
- Email tickets
- Survey responses
- NPS/CSAT comments
- Etc.

HumanFirst

- Explore data
- Discover trends
- Transform data
- Label data
- Structure data

Structured Data

- Insights/analytics;
- customer pain points
- areas for improvement
- opportunities for automation
- areas for cost savings

AI & Automation

Focus: Higher Value Work

When AI can act in a complementary capacity to your daily routine, you will have a choice to make – are you saving or making time?

Analytic Augmentation

Designing analytic systems that consider the importance of human-in-the-loop for AI correction and improvement will be key.

Explainability

Model adoption will depend on how readily explainable predictions or recommendations are.

Distribution of output quality across all the tasks. The blue group did not use AI, the green and red groups used AI, the red group got some additional training on how to use AI.

Current State - What Should be Top of Mind

online business systems

USE CASES
The possibilities are endless, so part of the challenge will be governance, ensuring your AI investment is targeted.

SKILLS NEEDED
Depends on the type of AI. Across the spectrum, embedding AI into a process relies heavily on domain expertise and system development experience.

THE RIGHT MINDSET
Hire for curiosity, inquisitiveness, and adaptability – these will be key as the field will evolve through many quick iterations.

38% of leaders see improving customer experience and retention as the primary purpose of initiatives to deploy applications trained on large language models

Gartner.

online business systems

CX Use Case - AI Agent Assist

Success Story

Johnston group

Johnston Group manages health and insurance benefits for over 30,000 businesses and Indigenous organizations across Canada, handling $600 million in premiums. The firm process thousands of cases and claims annually.

FIVE9 IMPLEMENTATION

1 THE CHALLENGE
- *Accelerate digital transformation for ROI.*
- *Improve CX and client and advisor satisfaction.*
- *Expand self-service automation for efficiency.*

2 THE SOLUTION
- *Implemented Five9 OmniChannel CCaaS.*
  - *Voice, chat and email.*
- *Deployed Five9 Intelligent Virtual Agents (IVAs) for routine inquiries.*
- *Enhanced efficiency and operations in customer service.*
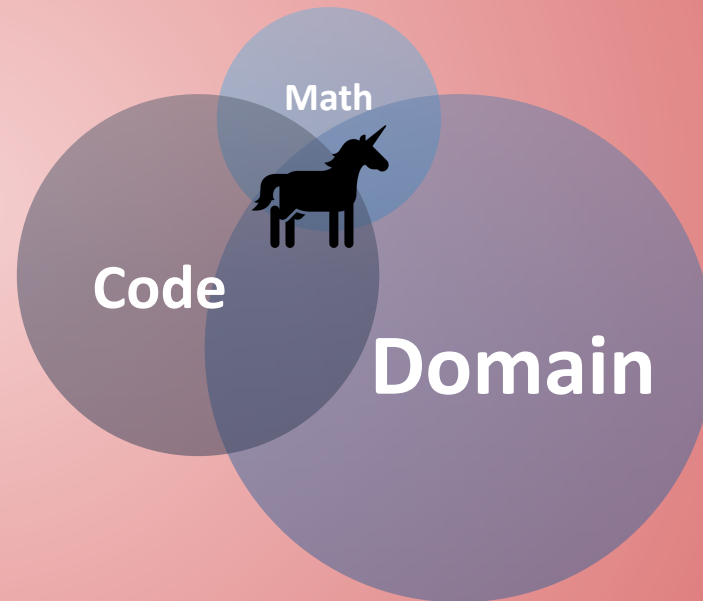
3 THE RESULTS
- *Enhanced client insights and reporting.*
- *Ongoing support and optimization of Five9.*
- ***IVA reroutes 90 calls daily, equivalent to 1.25 full-time advisor roles.***
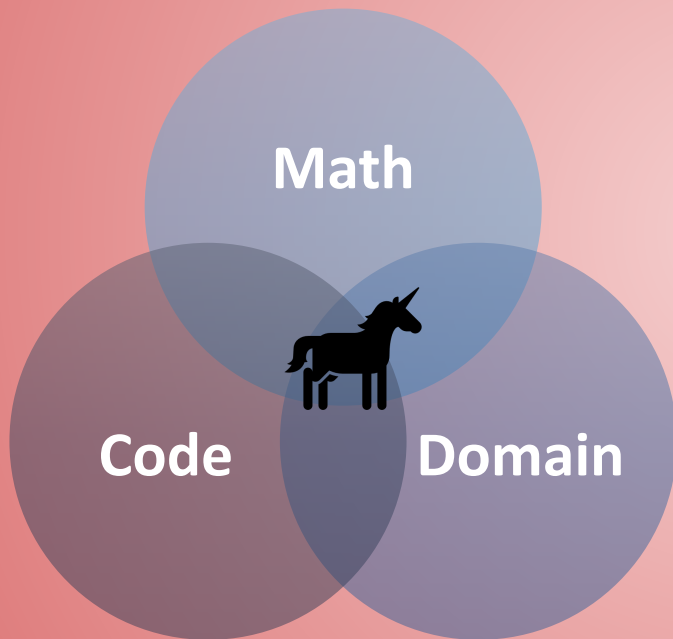
FUTURE STATE:

—

CX roles will expand in response to customer engagement concerns

Learning & Development will need to keep pace
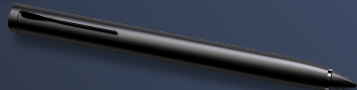
Technological advancement will speed up

½ Day Workshop

Workshops

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CUSTOMER EXPERIENCE WORKSHOP

Customer Experience & Contact Center Optimization Use Case - Five9 Demo.

DATA FOR AI USE CASES WORKSHOP

Prepare your data for AI success.