



Powering Customer Experience with **AI & Data**

Toronto, May 9.





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



CX, AI & Data
Services

Advisory
Services
Cloud
Services

CYBERSECURITY



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... 😏



Why is it time to change?

The Gartner logo, consisting of the word "Gartner" in a bold, dark blue sans-serif font, with a registered trademark symbol (®) to the upper right of the letter "r".

Gartner®

78%

of functional leaders will begin or continue to implement Generative AI across the next 12 months.

The Forrester logo, consisting of the word "FORRESTER" in a black serif font, with a registered trademark symbol (®) to the upper right of the letter "R".

FORRESTER®

60%

of workers will use their own AI to perform their job and tasks by the end of 2024

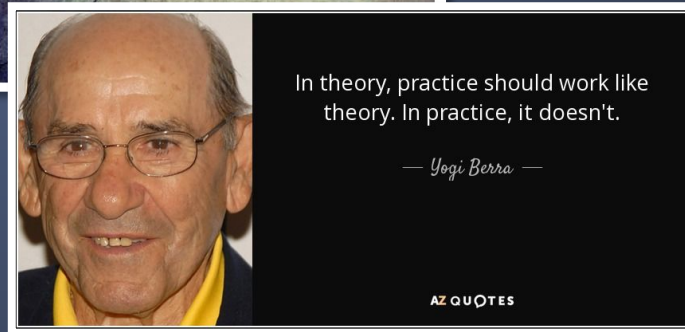
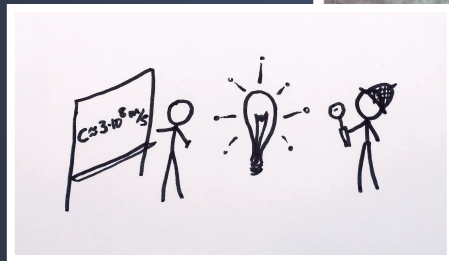
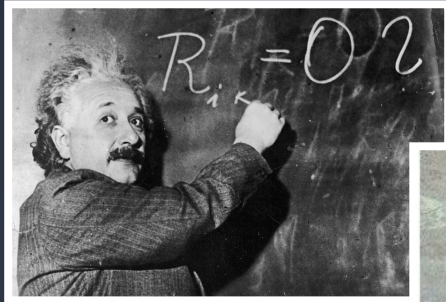
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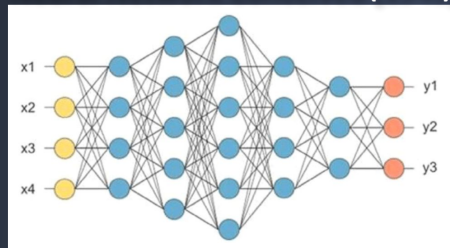
80%

of customer service and support organizations will be applying generative AI technology in some form to improve agent productivity and customer experience (CX) by 2025.

THEORY & PRACTICE



Neural Network Conceived (1943)



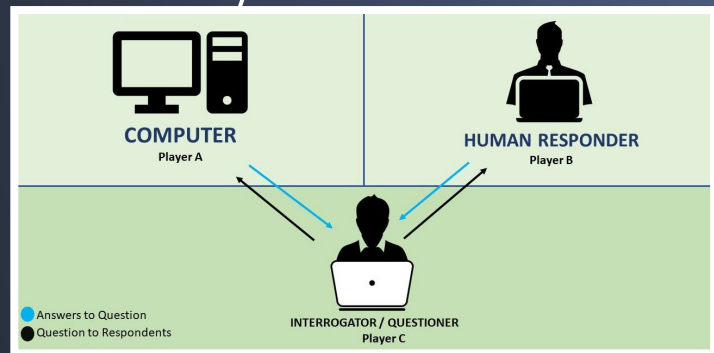
Deep Blue defeats G. Kasparov (1997)



Watson wins on Jeopardy! (2011)



Birth of AI as a field (1956)



Turing Test (1950)

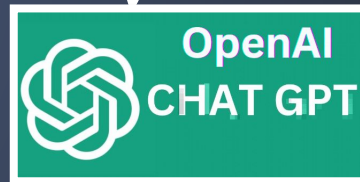
AI
Winter
#1

Backpropagation
popularized (1986)

AI
Winter
#2



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

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



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.

Managing Expectations & Change



| INTERNAL

Design AI implementations with user needs in mind and recognize that change management is essential

| EXTERNAL

Ethical questions around privacy, explainability, and transparency need to be answered

| EVALUATION

Know the metric you are trying to improve – otherwise, AI is just a toy

Current State - What Should be Top of Mind



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®

CX Use Case - AI Agent Assist

The screenshot displays the Five9 AI Agent Assist interface, which is designed to support customer service agents. The interface is divided into three main sections: a left sidebar, a central conversation transcript, and two right-hand panels for guidance and summary.

Left Sidebar: Features the Five9 logo at the top. Below it are four toggleable buttons: "Transcript", "Guidance", "Summary", and "Help". At the bottom is a "Logout" button.

Top Bar: Displays the customer's name "Natalie Semantic" on the left and the system build information "Build: 1.43.1 (10/15/2021, 8:33 am)" on the right.

Conversation Transcript: A central pane showing the dialogue between the agent and the customer. The transcript includes the following messages:

- Agent: "Hello who is this speaking" (11 months ago)
- Customer: "My name is Natalie"
- Customer: "Natalie Semantic" (11 months ago)
- Agent: "Hi Natalie, nice to meet you" (11 months ago)
- Agent: "Before we proceed, I need to ask you a few questions" (11 months ago)
- Customer: "Can I please confirm your full name" (11 months ago)
- Customer: "Natalie Semantic"

Guidance Panel: Provides context-specific prompts to the agent. It contains two sections:

- Auto-payment Reminder:** "Remind the customer about auto-payment options. There is a 10% add-on discount for setting autopayment using their debit card online."
- Payment Reminder:** "The next Payment on the account is due on the 15th of April."

Summary Panel: Offers a structured overview of the call. It includes a "Confirm Summary" button at the top right. The summary text is as follows:

- Call Summary**
- Agent said appropriate greeting
- Agent verified full name.
- HIPAA compliance updated with full name.
- Agent verified address.
- HIPAA compliance updated with address.
- Agent verified date of birth.
- HIPAA compliance updated

At the bottom of the summary panel, there is a feedback prompt: "How helpful was this summary?" followed by five star icons.



Natalie Semantic

Conversation Transcript

confirm your date of birth

1 year ago

My date of birth is October
31st 1989

Natalie Semantic: 1 year ago

Thank

1 year ago

Let me pull up your account

1 year ago

Your next payment is due
April

1 year ago

I want to make a payment

 Transcript

 Guidance

 Summary

 Help

 Logout

Guidance

Auto-payment Reminder

Remind the customer about auto-payment options. There is a 10% add-on discount for setting autopayment using their debit card online.

Payment Reminder

The next Payment on the account is due on the 15th of April.

HIPAA Compliance

Must confirm all:

- ☒ Full Name
- ☒ Date of Birth

Must confirm 1 of the following:

- ☒ Address
 - Group name
 - Phone number
 - Email
 - HPID

Success Story



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

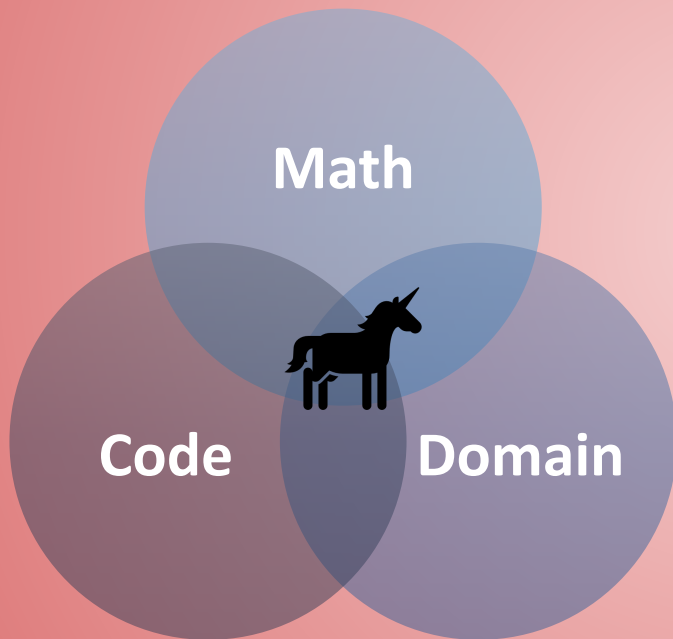
- *Implemented Five9 OmniChannel CCaaS.*
 - *Voice, chat and email.*
- *Deployed Five9 Intelligent Virtual Agents (IVAs) for routine inquiries.*
- *Enhanced efficiency and operations in customer service.*

3 THE RESULTS

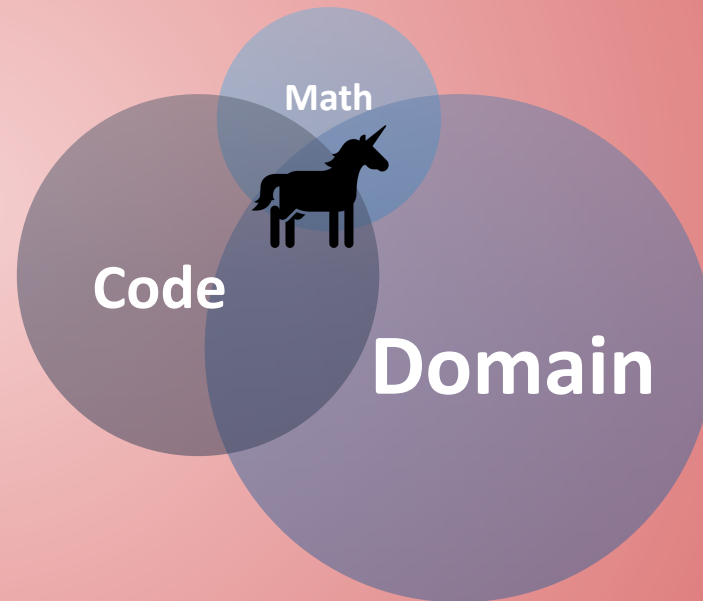
- *Enhanced client insights and reporting.*
- *Ongoing support and optimization of Five9.*
- ***IVA reroutes 90 calls daily, equivalent to 1.25 full-time advisor roles.***

TRANSITION: CURRENT TO FUTURE STATE:

Current-ish



Future-ish?



FUTURE STATE:



CX roles will expand in response to customer engagement concerns

Learning & Development will need to keep pace

Technological advancement will speed up

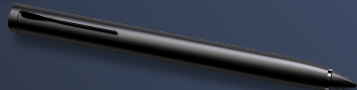
RECOMMENDATIONS

- Evaluate the quality of your data.
- Identify use cases where your products and services can be extended to machine customers.
- Initiate collaboration with your chief digital officer, chief data officer, chief strategy officer, sales leaders and chief customer officer to explore machine customers' business potential.
- Expose data interfaces, so that machine customers can search and understand them.
- Evaluate cloud platforms and operations to prepare for larger volume of requests and interfacing with your ecosystem.

WE ARE HERE TO HELP!



½ DAY WORKSHOP



**60 MIN CONSULTATION
CALL**



Workshops

CUSTOMER EXPERIENCE WORKSHOP

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

DATA FOR AI USE CASES WORKSHOP

Prepare your data for
AI success.