Conversational AI:
Simplifying Data Access for Customers

Brad Rickman, CEO
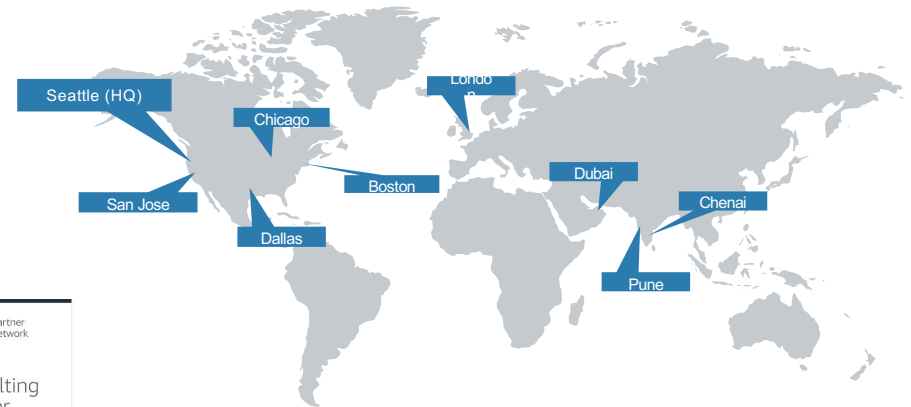bradr@smartek21.com

Agenda

SmarTek21®

- Overview of SmarTek21
- Becoming a Data-Driven Organization
- Preparing and Deploying Your Data
- Contextual User Engagement Through Conversational AI
- Conversational AI and the Data-Driven Organization

Provides data and AI services and software that transform organizations into digital enterprises that can thrive in a data-driven world

- Founded in 2006, 400+ employees
- Especially well-known for conversational AI, NLP, and data management/wrangling solutions. Holds 300+ patents
- Proven expertise in premise, hybrid, and multi-cloud infrastructure and services

Gold
Microsoft
Partner

Microsoft

aws partner network

Select
Consulting
Partner

Seattle (HQ)
Chicago
London
San Jose
Boston
Dubai
Chenai
Dallas
Pune

- Industry solutions for Sales, HR, Healthcare, and Telecom

SAMSUNG   T··Mobile·   Liberty Mutual   Expedia   NBC UNIVERSAL   KAISER PERMANENTE   yp The Real Yellow Pages

We are in an era of digital disruption

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Disruption can be a creative act *if* it is intentional and directed

- See disruption for what it is: creating new markets or leveraging the power of information to offer solutions in new ways.
- Be the disruptor.
- Surface your data assets.
- Think of ways to create entirely new products or services through new channels.

Forbes

The disruption that is radically reshaping today's markets – as well as creating new ones – is driven by data

What Does Being Data-Driven Mean?

A fundamentally different relationship between an organization and its data

Use data and analytics as a primary driver of strategy and business value

- Systemic use of high quality, non-siloed data
- Continuous – ideally real-time – use of data throughout the *entire* organization
- Utilize data as a way to drive forward motion rather than as a rearview mirror
- The technology, business processes, and culture to enable

"Organizations can use data to improve virtually anything they do, but a relative handful of standout organizations are using data in highly intentional, systematic ways to address strategic challenges and react to — and in many cases anticipate — sweeping changes in the markets they serve."

MITSloan
Management Review

Lessons from Becoming a Data-Driven Organization

Trends Shaping Your Digital Transformation

It is not purely a technological revolution, and it cannot simply be left to IT to achieve. Rather, digital business is a combination of people, processes and business models that combine to create new operational models and reach new markets.

Gartner

Technology Challenges

Leverage SaaS including **HRIS and AI** to focus on better experiences (Gartner)

Reduce the estimated **60% of time spent cleansing and preparing data** in order to analyze it (CrowdFlower)

Close the gap and gain a competitive edge over the estimated **90% of applications** which by 2023 will **fail to modernize** (Gartner)
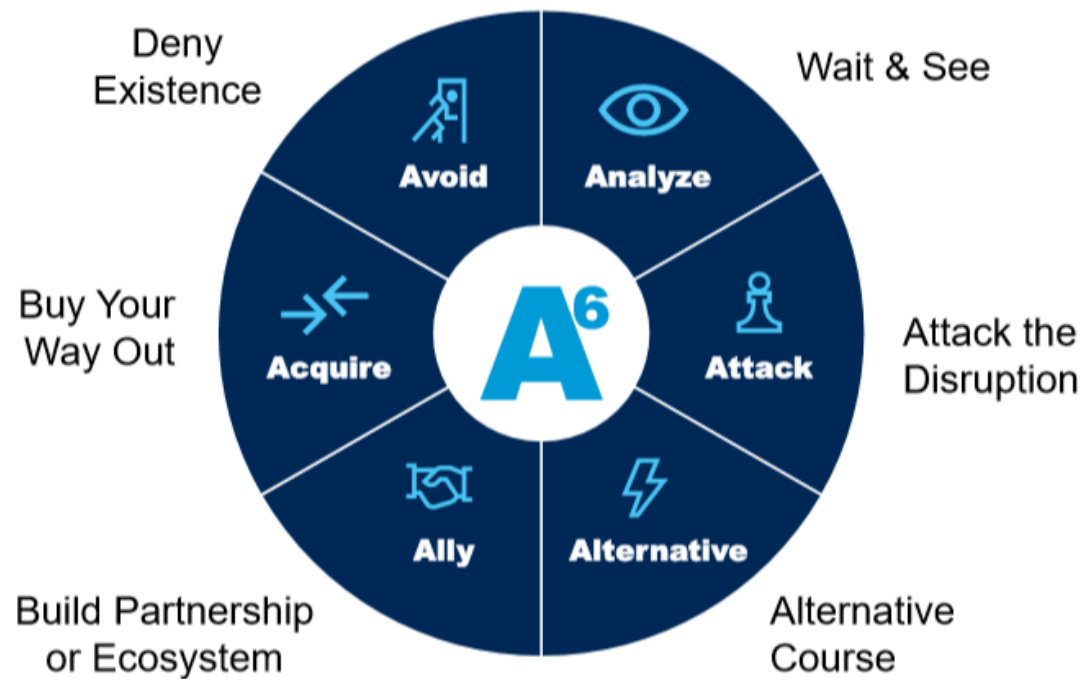
Business Challenges

Meet the demand for **better self-service** and reduce response times (SuperOffice)

CFOs are pushing IT to improve their ability to deliver, **62% asking for speed** and **38% for cost reduction** (Gartner)
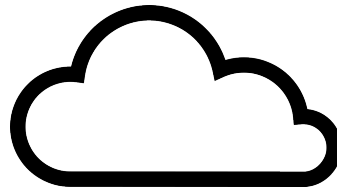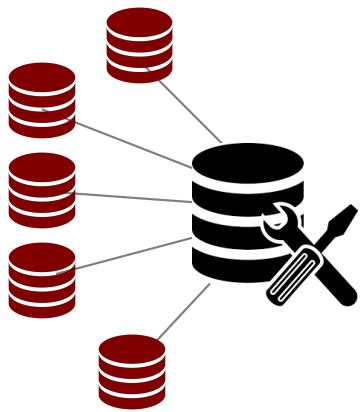
Outpace the less than **20% of companies capable of first-reply resolution** of customer service issues (SuperOffice)

Different Ways to Deal with Digital Transformation

Deny Existence — Avoid

Wait & See — Analyze

Buy Your Way Out — Acquire

Attack the Disruption — Attack

Build Partnership or Ecosystem — Ally

Alternative Course — Alternative

A^6

Gartner.

The Classic Tripartite View of Any Data Solution

Data Management/Preparation

"Gather your data and get it into a usable form"

Deployment and Availability

"Ensure the secure availability of your data throughout the organization"

User Engagement

"Let internal and external users and systems engage your data"

The Modern Tripartite View of Any Data Solution

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Data Management/Preparation
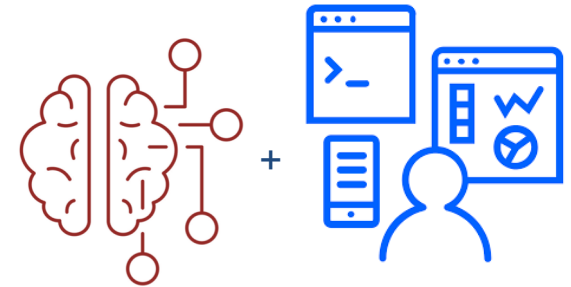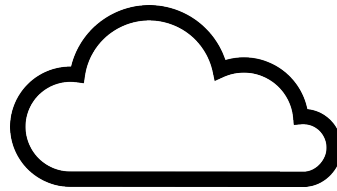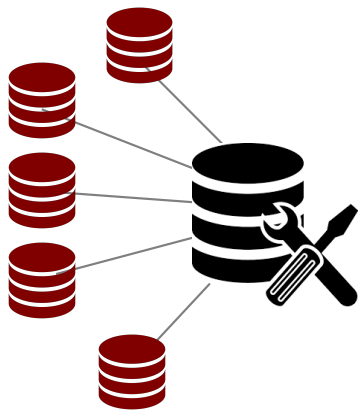
Deployment and Availability

Intelligent/Contextual Engagement

"Gather your data and get it into a usable form"

"Ensure the secure availability of your data throughout the organization"

"Let internal and external users and systems engage your data"

Capabilities Required for Digital Transformation

AI & Analytics

- BI and analytics
- AI and machine learning
- Predictive analytics
- RPA and bots
- NLP, cognitive, and personalization systems
- Image recognition

Cloud Technologies

- Cloud & hybrid infrastructure
- Security & access
- Governance/compliance
- DB/data estate migration and design
- Data and app modernization (rearchitect/refactor)

Data Strategy & Management

- Data management/wrangling
- Data source inventory and aggregation
- Data normalization & cleanliness
- Data strategy
- Process development

Data Management & Preparation

Connect disparate sources & clean/normalize data for greater accuracy

> *"Organizations believe that **33%** of their current customer and prospect data is inaccurate in some way and **89%** of C-level executives agree that inaccurate data is undermining their ability to provide an excellent customer experience." (Experian)*

- Do you have multiple data sources that don't talk together will?
- Does your reporting infrastructure fail to keep up with the growth of your data?
- Does it take too long to run reports or it is too hard to customize reporting?
- Does your team dismiss reports and believes the data is inaccurate?

Simplify integration initiatives and address the challenges of accessing all your data and improve its accuracy to power applications and insights.

- Data governance across disparate sources with consolidated views

- Backup and safeguard data with full audit support

- Deploy and/or customize analytics and BI tools

![Enterprise CloudConnect]

Innovative Enterprise Integration Platform

ECC is a hyper-acceleration platform that elegantly integrates disparate applications to unlock new levels of enterprise-level productivity.

Provides one view of different applications from heterogeneous Data Sources for the enterprise workforce.

Enables "hybrid cloud" architectures to extend legacy system value and provides cost effective "data cleansing" processes.

☑ GUI API creation & management

☑ Dashboard enablement with "one view" of entity records

☑ API to legacy or digital systems

☑ Data synchronization scheduler

☑ Workflow creation for business & process rule automation

☑ Simple & intuitive design builder
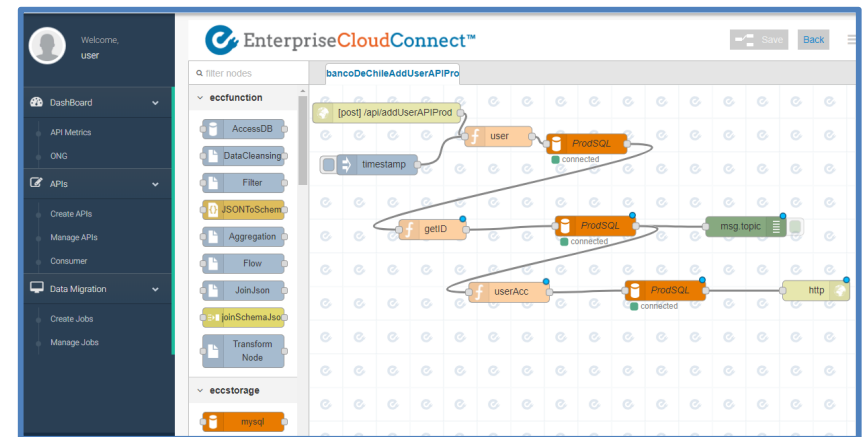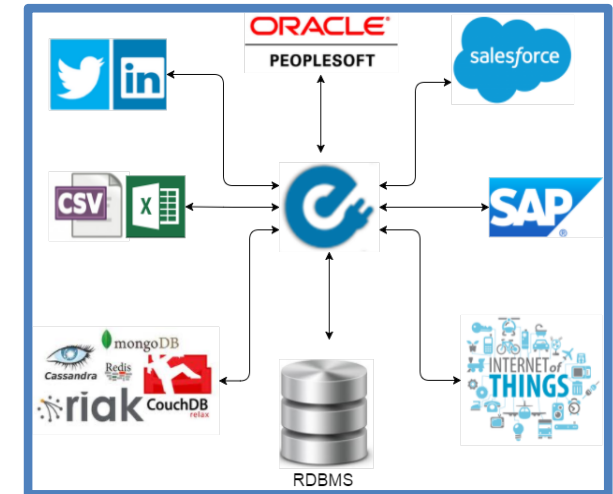
Large National Telco

Challenge

- Gather all data needed for Incentive Compensation Management (ICM).

- Multiple systems (16+) and disparate data sources (SAP, Salesforce, etc.) resulted in an IT intensive, inflexible, inefficient and time-consuming ICM process

Solution

- Ability to integrate with SAP, PeopleSoft and other core systems

- Personalized dashboards for sales personnel, managers and executives

Benefits

- 100% percent payback in eight months

- Eliminated onerous administration tasks with ICM

- Allows compensation admins to easily adjust and change date-effective rate data without IT assistance

- Innovative program employees to earn variable pay helps company increase productivity, customer service and profitability

- Reduction of technical debt by $5Million per year.
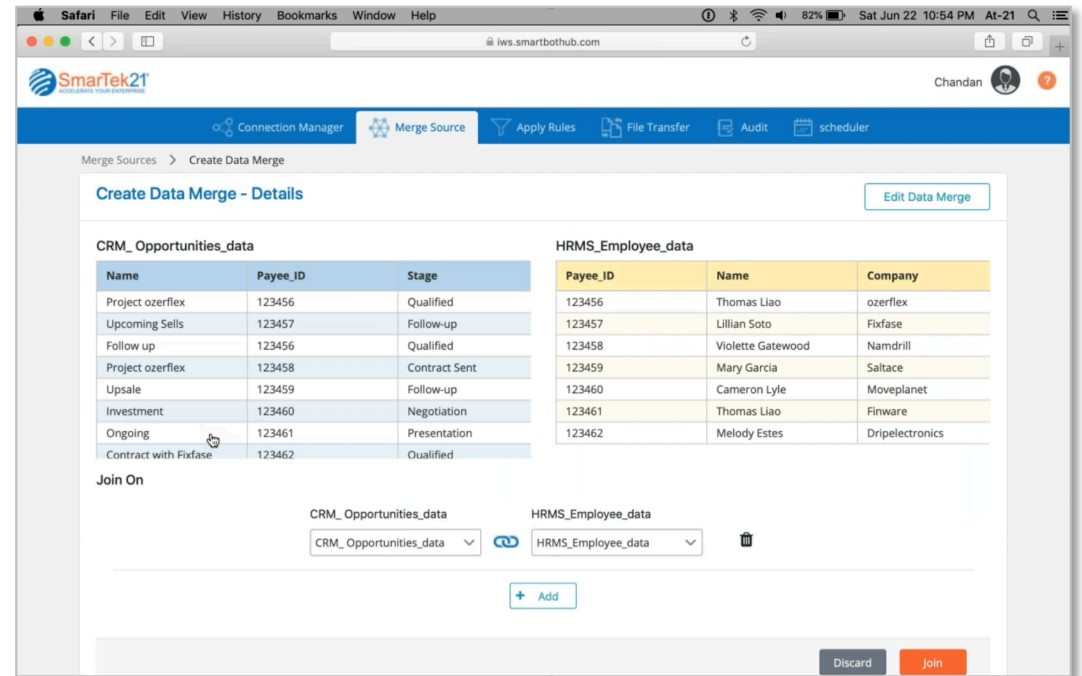
Hybrid and Multi-Cloud Data Services

56% *of CIOs in Gartner's CIO survey indicate they are adopting cloud as either an option or as part of a "cloud first" approach, while* *71%* *look to SaaS either first or as an option.*

Gartner.

- Are you looking to migrate key data systems to the cloud from on-premise or legacy systems?

- Are you experiencing performance issues with your data systems which impact scalability, reliability and/or latency?

- Are you concerned that a move to a public cloud will be too expensive or disruptive?

- An you ensure effective management of granular user and system privileges?

- Have you implemented a GRC compliance regime?

- Can you prove compliance through audits and analytics

Contextual Engagement

"Organizations recognize the need to take action regarding customer experience; yet, **75% of B2B** — and **40% of B2C** — organizations engage in isolated, bottom-up initiatives, often with little data other than an innate sense that something is not quite working and needs to be fixed." (Gartner)

- Transform the way your company does business in the digital world and improve customer satisfaction.
- Engineered from the ground up for omni channel interactions
- Connect and integrate multiple data sources and applications to present information in a meaningful and personalized way

Artificial intelligence (AI) will become a critical component of user experience (UX), with conversational AI leading the initial charge… Conversational UI will revolutionize the world of UX.

Gartner.

Conversational AI

Conversational UI will revolutionize the world of UX.

It will simplify access to data, information, applications, services, processes, and other people. …conversational AI will become the dominant for of UX over time, especially in consumer-facing scenarios

Gartner

A comprehensive conversational platform that can help you customize and personalize customer experiences

- 10x increase in sales

- 50% reduction in call center volume through self-service interactions

- 59% increase in customer retention

- 6 weeks time-to-value & to realize benefits

Gartner®

Top 20 Market Guide for Conversational Platforms

SmartBotHub provides all key elements highlighted by Gartner including:

- Virtual Customer Assistants (VCAs)
- Virtual Enterprise Assistants (VEAs)
- Virtual Personal Assistants (VPAs)
- Chatbots

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Vendor	Product	Self-Service Signup	Deployment		NLP		Input Modalities	
			Cloud	On-Premises	Proprietary	Third-party	Text	Voice
SmartBotHub	SmartBotHub	x	x	x	x	x	x	x
Microsoft	Multiple	x	x	x	x	x	x	x
Amazon Web Services	Lex and Alexa for Business	x	x		x		x	x
Artifical Solutions	Teneo		x	x	x	x	x	x
Conversable	Conversable		x		x	x	x	x
Creative Virtual	V-Person		x	x	x	x	x	x
Eudata	Convy AI		x	x	x	x	x	x
Facebook	Messenger Platform	x	x		x		x	
Google	Dialogflow	x	x		x		x	x
Gupshup	Gupshup	x	x	x	x		x	x
IBM	Watson Assistant	x	x		x		x	x
iFlyEK	AIUI open platform	x	x		x		x	x
IPsoft	Amelia		x	x	x		x	x
Kore.ai	Bots Platform	x	x	x	x		x	x
Nuance	Customer Engagement Platform		x	x	x	x	x	x
OneReach	Communication Studio and Live Agent	x	x		x	x	x	x
Openstream	EVA		x	x	x	x	x	x
Oracle	Oracle Conversational AI Platform	x	x		x		x	x
Rasa	Rasa Stack and Platform	x		x	x		x	
Salesforce	Einstein Bots	x	x		x		x	

¹ Uses Wit.ai (owned by Facebook) to customize the built-in natural-language processing (NLP)
² Voice offered through IBM Watson Speech to Text service
³ Microsoft's Conversational Platform is realized through multiple offerings: Bot Framework, BotBuilder SDK, Language Understanding Intelligent Service (LUIS), QnA Maker, etc.
⁴ NLP through LUIS will still be cloud-based
⁵ Part of Oracle Mobile Cloud Enterprise
⁶ Rasa Stack is downloadable as open-source
⁷ Limited to existing customers of the Salesforce Platform

![SmartBotHub] **SmartBotHub**   **Industry Leading Conversational AI Platform**

- SmartBotHub can have a profound impact on your ability to address the ongoing challenges of delivering effective online interactions and monetize them.

- Highlighted by Gartner as a top 20 Conversational Platforms because it has been specifically engineered for marketing, customer care, and operation teams and to enable new businesses models.

☑ Omni channel

☑ Natural language processing (NLP) & Artificial Intelligence (AI)

☑ API creation & management to legacy or digital systems

☑ Personalization & recommendations

☑ AI engine & customization

# Conversational AI in Global Professional Services Org

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Challenge
- Difficult content management UI for users--low adoption rate (<5%) for finding tax info
- Support ambiguously worded, jargon-filled queries from 5000+ tax pros
- Personalized interactions aware of prior information requests

Solution
- Conversational AI system aggregating 20+ API points of system information.
- Web UI makes it available to all tax pros

Benefits
- Targeting 50% plus utilization in first 6 months
- Shifts the burden of interpreting data from user to system
- Provides context and personalization, which drive more accurate results
- Reduce costs by enabling powerful self-service support/engagement solutions
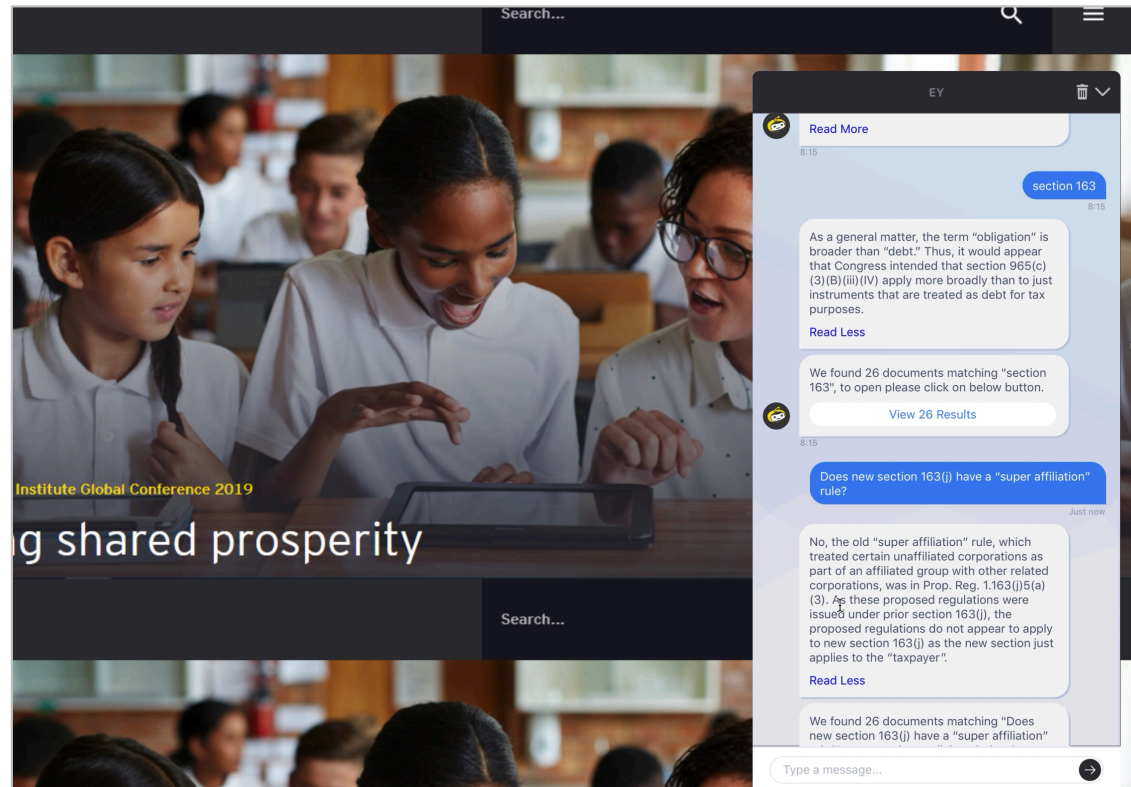
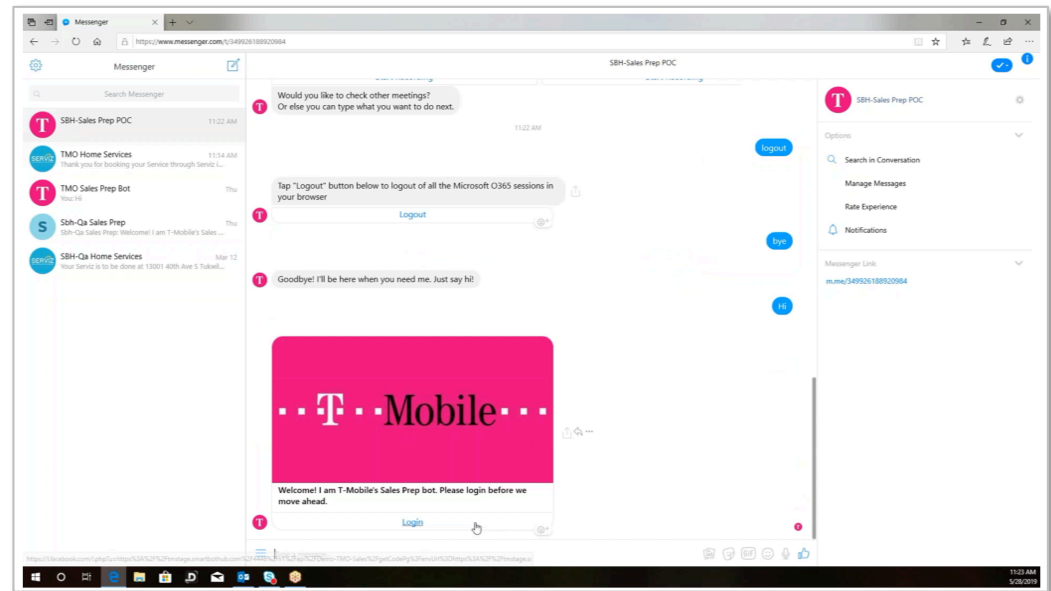# Conversational AI in Large Telco

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Challenge
- Need to create more efficient processes for 500+ direct sale organization with 5-10 sales meetings/week/rep
- Incorporate multiple systems (O365 / Skype / SF.com / content management).

Solution
- Conversational AI solution to quickly prep sales reps for meetings while interacting with multiple systems to create efficiency

Benefits
- Reduced time for meeting preparations and system update tasks from hours to seconds.

Summary

By 2020, conversational artificial intelligence (AI) will be a supported user experience (UX) for more than 50% of large, consumer-centric enterprises. Conversational AI will become pervasive in consumer user experience use cases.

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- Simplifies access to data, information, applications, services, processes, and other people.
- Provides context and personalization, which drive more accurate results
- Reduce costs by enabling powerful self-service support/engagement solutions

Conversational AI drives adoption of data-driven solutions
Ideal first step towards becoming a data-driven organization