

October 2023

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

A Deloitte Digital Perspective

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Digital





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INTRODUCTION

Generative AI can unlock untapped value for customers and organizations

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

Managing customer interactions with GenAI and CRM

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

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

CRM in the context of this guide refers to all the capabilities that touch and enable customer interactions, including the applications, data, orchestration, and workflow that support Marketing, Sales, Commerce, Service, and Customer Success functions.

FUNCTIONAL DOMAINS IMPACTING THE CUSTOMER JOURNEY

MARKETING

SALES

COMMERCE

SERVICE

CUSTOMER SUCCESS

Demystifying emerging GenAI technology through key guiding principles

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

Key Guiding Principles

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

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

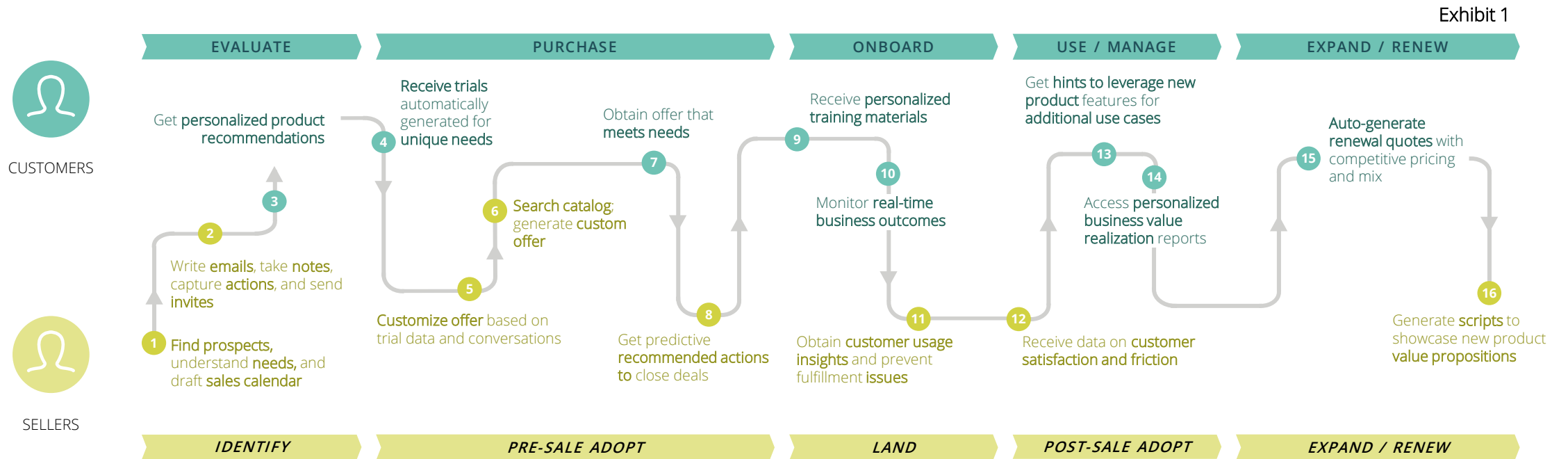


Applications across the customer journey

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

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

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



Realizing business value and maintaining trust

2. Focus on tangible business value

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

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

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



3. Design for Trusted AI by thinking beyond the data

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

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

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

Getting started



Exhibit 2

4. Be pragmatic and start through experimentation

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

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

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

— CONSIDERATIONS TO GET STARTED WITH GENAI —

Although every organization has unique needs, this checklist can be a helpful starting point:

- Take a user-centered approach by designing GenAI experiences into user journeys to address pain points and unlock new value
- Identify high-value use cases that balance desirability of experiences, feasibility of implementation and viability of projected returns
- Collect and vet the required data to support the prioritized use cases
- Set a flexible test and learn pilot plan to help de-risk implementations
- Define a technology and model strategy to build solutions
- Set a communication and governance strategy to establish trust and drive adoption amongst customers and employees

Functional Domain Deep Dive

Marketing

02



Introduction: GenAI and Marketing

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

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

KEY POTENTIAL BENEFITS FOR MARKETERS

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

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

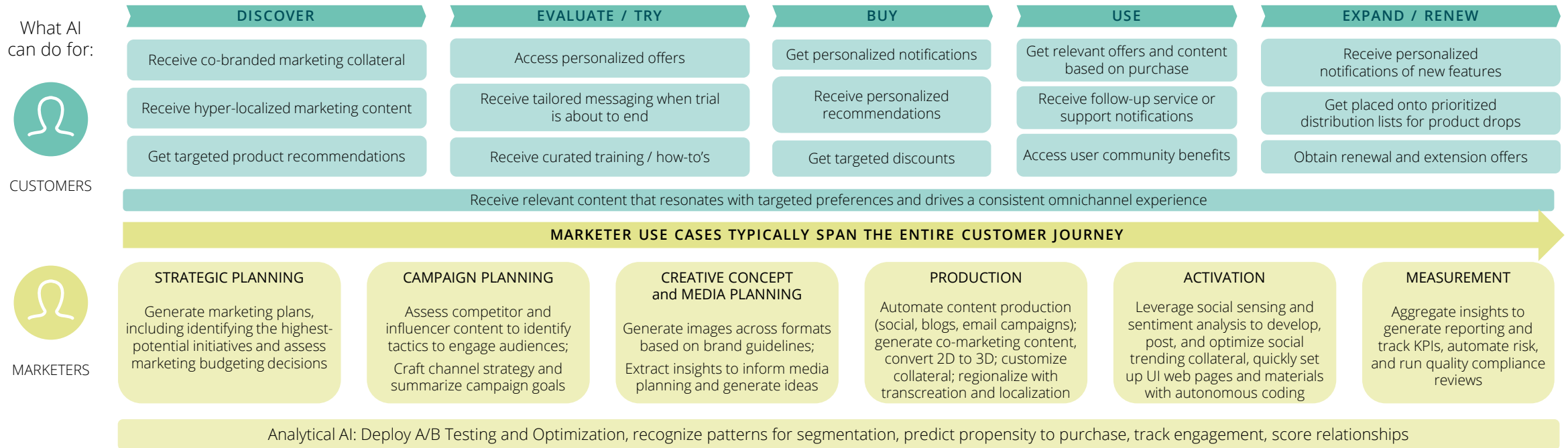
In this chapter, we explore the following use cases: Content Creation, Transcreation, Partner Co-Marketing, Social Media Sentiment Analysis, and Search

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GenAI Capabilities and Use Cases for Marketing

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



Value Provided

CUSTOMER CROSS-JOURNEY POTENTIAL BENEFITS

- Enhanced experience
- Higher engagement
- Greater personalization
- Omnichannel consistency
- Higher satisfaction
- Better discovery and search outcomes
- Increased variety
- More relevant content
- Better targeted offers and notifications
- Tailored support

MARKETER CROSS-JOURNEY POTENTIAL BENEFITS

- Improved marketer efficiency
- Increased speed to market
- Enhanced customer offerings
- Faster product adoption
- Better targeting
- Higher conversion
- Greater brand reach
- Increased LTV
- Higher revenue
- Lower agency costs
- Improved use of co-marketing funds

Content Creation

Creative horizons expanded: Accelerating speed-to-market and scale using GenAI

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

Issues and opportunities

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

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

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

How GenAI can help

- 1. Multiformat content creation:** GenAI can generate content across diverse formats (e.g., blogs, social media posts, email campaigns) by analyzing existing content, understanding the target audience, and generating copy for the desired format, tone, and campaign outcome. This allows marketers to more efficiently scale content across platforms and channels.
- 2. A/B testing and optimization:** GenAI can generate multiple content variants for A/B testing. It helps marketers identify which content resonates best with the audience and refine content strategies accordingly to drive greater engagement and conversion.
- 3. Integration into existing workflow:** GenAI can be integrated into a marketer's existing workflow, eliminating need for multiple content generation tools or processes. Marketers can directly input requirements and refine AI-generated content within established processes.

This applies if you have...

- Diverse content needs across audiences and customer segments
- Varied customers requiring different messages
- Limited capacity with the marketing / creative teams
- Decentralized content creation process
- Slow time-to-market

Potential benefits



Improved customer engagement

Deliver content that resonates with preferences and results in deeper connections and more meaningful interactions



Personalization at scale

Better tailor content to individual preferences to foster stronger connections and drive improved engagement



Efficiency and time savings

Free marketers from time-consuming manual tasks and unlock prioritization of strategic planning and creative

Transcreation

Across borders and languages: Enhancing messaging with GenAI transcreation

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

Issues and opportunities

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

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

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

How GenAI can help

- 1. Cultural adaptation:** GenAI can analyze the cultural nuances of both the source and target languages. It helps ensure that the transcreated content not only accurately translates words, but also captures the cultural context, idioms, references, and sentiment leading to higher customer engagement globally.
- 2. Maintaining brand voice:** Transcreation enables consistency in the brand's tone and voice. GenAI can generate content that aligns with the brand's identity while matching the complex linguistic and cultural specifics of the target audience.
- 3. Localization for various channels:** Different regions might have preferred marketing channels. GenAI can adapt transcreated content for various platforms, such as social media, websites, or print.

This applies if you have...

- International presence with content localization needs
- Imperative to maintain cultural relevance in global markets
- Challenges with accurate translation and adapting messaging
- Efforts to streamline and speed up transcreation processes

Potential benefits



Scaling capability

Scale volume of localized content across markets with limited additional resourcing



Global consistency

Maintain consistency across regions by ensuring uniformity of key phrases and brand messaging



Cost-effectiveness

Deliver longer term cost savings by reducing the need for extensive manual transcreation work, especially for repetitive content in multiple markets

Partner Co-Marketing

Collaborative success unleashed: Elevating joint campaigns with GenAI

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

Issues and opportunities

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

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

How GenAI can help

- 1. Collaborative content generation:** GenAI can generate co-marketing content that aligns with the messaging and branding of both partners, as well as formalized partner program guidelines. It analyzes each partner's content style and merges both to create cohesive materials that better resonate with the shared target audience.
- 2. Cross-platform adaptation:** Co-marketing often involves promoting content across different platforms. GenAI can adapt content for various platforms, help ensure consistency, and optimize the content for each channel to enhance user engagement.
- 3. Integration into partner workflows:** GenAI can integrate into the workflows of both partners, reducing workflow steps and coordination, and increasing the convenience of collaborating on marketing materials.

This applies if you have...

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

Potential benefits



Expanded audience reach

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



Increased brand visibility

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



Efficiency and time savings

Free marketers from time-consuming manual tasks and unlock prioritization of strategic planning and creative

Social Media Sentiment Analysis

Unlocking audience insights: Harnessing GenAI to decode trends and sentiment

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

Issues and opportunities

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

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

How GenAI can help

- 1. Sentiment classification:** GenAI can accurately collate and classify social media posts and comments into positive, negative, or neutral sentiments, providing a quick, real-time overview of customer sentiment trends.
- 2. Topic and keyword analysis:** GenAI can extract key topics and keywords associated with positive or negative sentiments, helping brands identify which aspects of their products, campaigns, or messaging resonate with audiences.
- 3. Competitor analysis:** GenAI can quickly analyze sentiment and activation across a broad competitive set, to inform competitive benchmarking and due diligence. These insights can augment a marketer's ability to deploy content in real-time that helps position brands ahead of their competition.

This applies if you have...

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

Potential benefits



Optimized customer engagement

Deliver more personalized and authentic content by tapping into deep insights and real-time analysis



Real-time insights

Act on emerging trends and proactively manage brand risk by understanding changes in real-time



Cost savings

Deliver longer-term cost savings by complementing existing social media monitoring with GenAI solutions

Search (SEO and SEM)

Digital visibility amplified: Navigating the online landscape with GenAI

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

Issues and opportunities

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

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

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

How GenAI can help

- 1. Keyword optimization:** By analyzing user search behavior in greater detail and at scale, GenAI can pinpoint keywords that customers actively use to find relevant content. Brands can then strategically incorporate these keywords into their content planning, boosting visibility in search results and driving incremental organic traffic.
- 2. Trend prediction:** With the ability to analyze substantial search data, GenAI detects emerging trends in user queries and interests. This predictive insight empowers brands to adapt content strategies proactively. By creating content aligned with these trends, brands can capture higher search rankings and user engagement, staying ahead of evolving preferences.
- 3. User intent analysis:** GenAI can determine whether users seek information, want to make a purchase, or need solutions. By aligning content with user intent, brands enhance content relevance and customer satisfaction. This approach drives conversions and builds brand loyalty.

This applies if you have...

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

Potential benefits



Tailored user-centric content

Better address individual needs by analyzing user intent to enhance relevance and boost conversions



Proactive trend alignment

Customize content to emerging user interests, resulting in higher search rankings



Strategic keyword integration

Drive improved search visibility and organic traffic by ensuring content aligns with user specific search

Global transcreation for a technology company with widespread regional operations



CHALLENGE

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

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

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

SOLUTION

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

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

IMPACT

- Increased the speed of rolling-out local market campaigns
- Reduced agency fees and marketer time required for transcreation / localization
- Unlocked the ability to scale marketing campaigns to smaller markets (i.e., with AI, there is sufficient return on investment to transcreate for small markets that might otherwise receive English-language marketing)

Co-branding and partner marketing for a global technology company

CHALLENGE

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

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

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

SOLUTION

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

1. **Social Posts** – Partner marketing white paper text from PDF files was parsed using Python and different prompts and then fed to a tool to create short, informative Tweets, headlines, one- paragraph write-ups, and / or short synopses highlighting key takeaways.
2. **Article Summary** – Long-form partner marketing content was fed into GenAI LLMs to create summarized value propositions, competitive advantage statements, and article summaries for activation across partner marketing channels.

IMPACT

- Increased the speed of rolling out co-branded campaigns and content
- Scaled campaigns to additional channels or markets given greater efficiency in content production
- Enabled more consistent messaging across content formats and enhanced brand equity
- Improved engagement, conversion, and customer outcomes
- Reduced agency fees and marketer time required to generate marketing campaigns aligned with co-branding guidelines

Proprietary platform for efficient, global “no touch” ad content creation

CHALLENGE

On average, 10% of ad design jobs are “complex,” requiring design from scratch with no reference visuals or copy. This content category takes on average 3X more handling time than lower-complexity jobs (simple adaptations like adding borders or making changes based on guidance).¹ As marketers and creative teams can be creating tens of thousands of new assets every quarter (across individual social ads, landing pages, search ads, etc.), continuously producing fresh and engaging content while maintaining consistency across brand voice, channels, and platforms is a challenge.

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

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

SOLUTION

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

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

IMPACT

- Enhanced creative outputs
- Increased capacity by 2X for complex content creation, with a 48% reduction in average handle time¹
- Opened new opportunities for highly nuanced content such as in regulated industries (e.g., pharmaceutical, finance)
- Scaled messaging personalization across hyper-targeted segments

Functional Domain Deep Dive

Sales

03



Introduction: GenAI and Sales

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

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

In addition to unlocking new features, GenAI optimizes the sales process by reducing administrative burden. This benefits sellers who are traditionally inundated with administrative tasks that detract from value-added selling activities, such as updating opportunities and contacts, providing deal updates, manually creating forecasts, or validating commission statements.

KEY POTENTIAL BENEFITS FOR SELLERS

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

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

In this chapter, we explore the following use cases: Seller Productivity, Sales Enablement, Customer-Centric Offers, Intelligent Lead Generation / Prospecting, Personalized Sales Incentive Offers, and Sales Target Compensation and Communication

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GenAI capabilities and use cases for sales

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

What AI can do for:



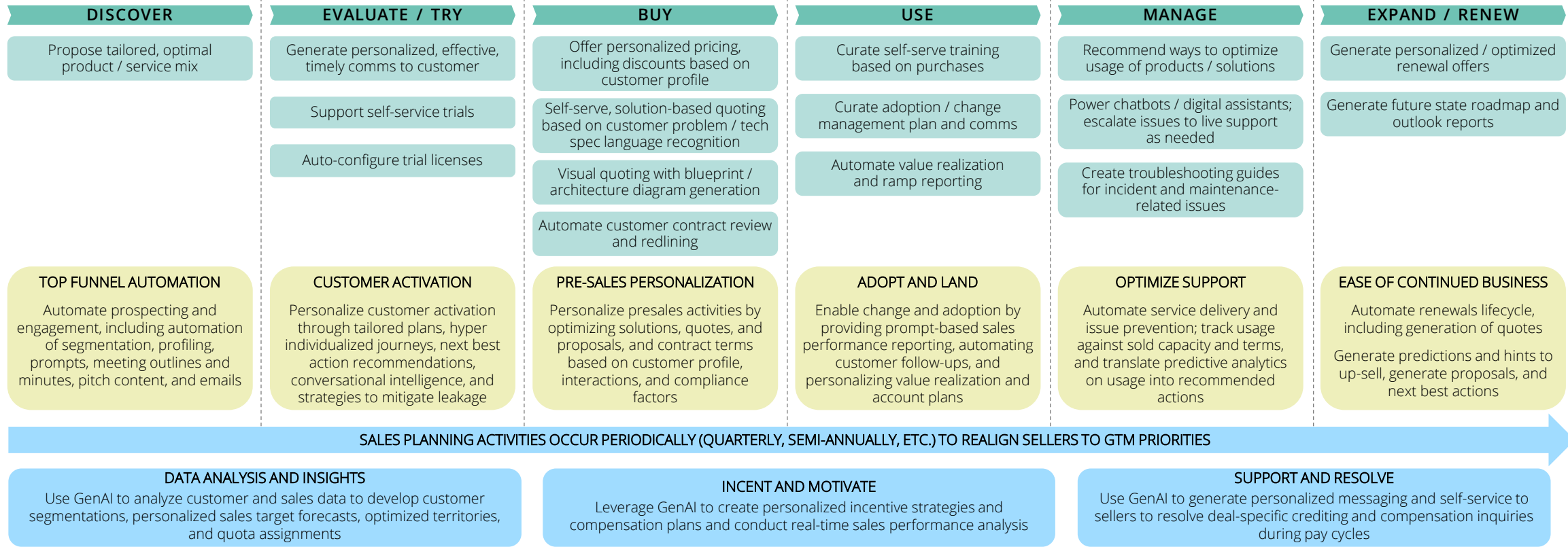
CUSTOMERS



SELLERS



SALES PLANNING



CUSTOMER CROSS-JOURNEY POTENTIAL BENEFITS

- Improved customer experience
- Better self-serve capabilities
- Higher satisfaction
- More relevant sales outreach / comms
- Improved, faster adoption of products / services

SELLER CROSS-JOURNEY POTENTIAL BENEFITS

- Reduced time spent on admin tasks
- Improved, personalized seller training
- Improved seller productivity
- Higher initial buy conversion rates
- Improved cross-sell and retention rates
- Greater competitive advantage
- Maximized sales earnings with personalized plans
- Greater satisfaction and motivation due to transparent compensation rationale

SALES PLANNING CROSS-JOURNEY POTENTIAL BENEFITS

- Optimized seller performance and coverage to increase productivity
- Better incentives, lower attrition, and improved understanding of compensation alignment to GTM priorities

Value Provided

Seller Productivity

From administrative to strategic: Enabling productivity and personalization with GenAI

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

Issues and opportunities

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

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

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

How GenAI can help

- 1. Auto-update CRM:** AI and machine learning (ML) continually update the CRM tool to maintain pipeline hygiene, significantly offloading administrative burden from sellers.
- 2. Smarter action prompts:** GenAI parses diverse marketing, sales, and customer data at scale to present the right action / content to the customer instantly, dynamically creating a personalized, effective journey.
- 3. Effective sales content generation:** In real-time, GenAI accurately analyzes past successful interactions, trends, and prospect data to help inbound and outbound reps build rich new content that is tailored to a specific customer's product / service needs.
- 4. Seller capacity maximization:** GenAI accelerates sequences with voice-to-text capabilities (e.g., transcribe meetings, summarize calls, take actions, propose calendar invites) that offload admin work so sellers can focus on selling.

This applies if you have...

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

Potential benefits



Improved seller productivity

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



Enhanced customer relevance

Providing customers with rich, relevant content – with or without a seller engaged – supports overall customer satisfaction



Strengthened brand

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

Sales Enablement

Fit-for-purpose: Dynamic enablement and alignment across the sales motion

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

Issues and opportunities

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

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

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

GenAI enables organizations to shift from standardized to dynamic enablement that is fit for sellers' roles and sales motions.

How GenAI can help

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

This applies if you have...

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

Potential benefits



Enhanced customer experience

Interpret customer conversations, sentiments, and data to improve recommendations and engagement



Expedited training and onboarding

Aid sales self-learning with user-centric approaches to deliver relevant content, meeting audiences where they are / how they learn best



Empowered sales managers / leaders

Managers gain insights on performance / behavioral patterns via AI-transcribed data, so they can offer customized feedback and support to grow skills

Customer-Centric Offers

Holistic quoting and contracting: Offering dynamic and hyper-personalized solutions

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

Issues and opportunities

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

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

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

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

How GenAI can help

- 1. Produce visual quotes:** GenAI enables users to visually configure or customize solutions (e.g., architectural diagram for software or blueprints for industrial products) that overlay products with a customer's existing technical / product landscape.
- 2. Enable customer self-serve quoting:** GenAI responds to customers' text inputs (describing their issues, use cases, etc.) in real-time, generating quotes with product configurations and pricing tailored to address their specific needs.
- 3. Customer-centric contracting:** GenAI analyzes past customer contracts, performance, and engagement to make dynamic, optimized recommendations for any journey (purchase, add-on, renew, etc.), rather than relying on static, pre-defined rules.

This applies if you have...

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

Potential benefits



Enhanced customer-centricity

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



Improved customer retention

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



Increased process efficiency

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

Intelligent Lead Generation and Prospecting

Lead generation accelerated: Introducing precision to targeting strategies

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

Issues and opportunities

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

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

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

How GenAI can help

- 1. Buyer profile building:** GenAI can analyze CRM and other data and identify patterns (industry, location, size, job titles) and preferences to build detailed buyer profiles that help sellers understand their needs and tailor outreach accordingly.
- 2. Lead prioritization:** GenAI can analyze a range of customer interactions (e.g., call transcripts, emails) to assess customer sentiment and predict propensity to buy, enabling smarter lead prioritization so sellers can spend time most effectively.
- 3. Power chatbots:** GenAI enables a human-like Q&A experience for customers seeking instant, no-pressure responses tailored to their exploratory queries, before engaging a seller. Prospects misaligned with target profiles can be weeded out.
- 4. Seller co-pilot:** GenAI can learn specific customer personas, communication styles, and common objectives to tailor recommendations / prompts to sellers based on deal stage.

This applies if you have...

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

Potential benefits



Enhanced precision in targeting

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



Improved lead conversion rate

Prioritizing pursuits with higher chance of purchase generates healthier leads which can qualify and convert faster



Optimized resource allocation

Reps focus on leads that align with the company's ideal customer profile, maximizing the impact of their efforts

Personalized Sales Incentive Offers

Individualized incentives: Personalize compensation plans to individual motivations

Compensation plans are often supplemented with special incentives such as gifts, cash, trips, etc., and are used to motivate sellers to achieve specific goals. GenAI can be used to help create incentives that are personalized to specific opportunities for an individual seller.

Issues and opportunities

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

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

How GenAI can help

- 1. Personalized incentives:** AI can learn from historic sales and analyze various customer cohorts, including current market conditions and competitor data, to identify products and services that are most likely to gain traction within each cohort. It can also learn from the outcomes of different personalized compensation strategies and continuously refine its suggestions based on actual sales results and seller performance. This feedback loop enhances the accuracy of future recommendations, improving seller behavior and driving additional revenue for the organization
- 2. Communication and transparency:** GenAI can create explanations to communicate the rationale, structure, and payment terms behind compensation plans to sales teams, enhancing transparency and understanding
- 3. Personalized incentive tracker:** GenAI can generate personalized communications to sellers detailing their progress and encouraging them to execute on sales to achieve their highest potential earnings

This applies if you have...

- Generic sales compensation plans
- Unmotivated sales reps

Potential benefits



Trust and transparency

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



Increased motivation

Motivated sales teams leads to better sales conversion and additional revenue



Strategic alignment

Personalized incentives align behaviors to sales strategy through customized plans aligned to customer cohorts and individual sellers

Sales Target and Compensation Communication

Strategic compensation: Aligning sales behaviors to GTM strategy and priorities via compensation clarity

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

Issues and opportunities

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

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

Further, insufficient understanding of compensation plans can lead to selling that is misaligned to the company strategy.

How GenAI can help

- 1. Timely communication of territories, sales targets, and compensation plans:** GenAI can aid in quickly creating communications for reps to best understand their account assignments, quota targets, and compensation plans and how they align with company strategic goals.
- 2. Compensation plan comprehension:** GenAI can help answer sellers' questions about their assignments or plans so that they fully understand their selling responsibility, how they will be paid, and the underlying strategy.
- 3. Crediting inquiries:** GenAI can be used to answer any questions a rep has around their crediting and compensation on specific deals. This can alleviate confusion and mistrust that a rep has about how or why they are receiving a specific compensation amount and enable Sales Ops to continue to focus on company strategic objectives.

This applies if you have...

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

Potential benefits



Increased rep satisfaction

Eliminating confusion on account assignments and compensation plans boosts rep satisfaction



Improved time-to-market

More quickly communicating assignments and plans to reps expedites time-to-market



Shortened response time

Inquiries on crediting and compensation can be handled faster

Reduced sales administration time

CHALLENGE

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

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

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

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

SOLUTION

GenAI and other automations combine to accelerate efficiencies across the sales cycle:

Customer-facing activities: GenAI powers relationships by integrating directly in CRM sales cadencing flows; it generates content such as sales pitches in the form of pitch decks, call scripts, emails (based on lead / opportunity stage and notes, prior interactions, etc.) which sellers then refine and use in upcoming engagement.

Account planning and review activities: GenAI coupled with AI solutions analyze customer purchase history, margin data, demographic data (e.g., segment, profile), and unstructured data (e.g., voice, sentiment) to generate quarterly business review (QBR) materials and account plan presentations.

Administrative activities: Natural Language Processing (NLP) powered AI mitigates wasted sales effort by transcribing and summarizing customer meetings and emails in near-real-time. GenAI then identifies / auto-logs completed tasks as notes / next steps under the CRM account, contact, and opportunity.

IMPACT

- Improved sales focus on value-add sales activities offloading seller admin tasks to GenAI solutions and automation
- Enabled better customer experiences by more relevant, personalized and customer-centric outreach
- Reduced cost-to-serve from reduced interaction cycles and overall shorter sales cycles
- Improved and timely sales leadership visibility to pipeline activities

Personalized seller training at enterprise scale

CHALLENGE

Customer buying behaviors are increasingly complex and ever-changing, requiring sellers to cover more products / solutions and upskill on new sales strategies and tactics with insufficient support from meaningful content / training throughout sales cycles.

These challenges are exacerbated by sales teams being asked to do more with the same (or potentially less) resourcing – particularly in business environments that are cost efficiency-focused or resource-constrained. Such organizations may also see lower investment in sales enablement roles and tools. Such increased expectation of sales enablement coverage paired with fewer allocated resources can overburden employees and risk sales performance deterioration.

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

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

SOLUTION

GenAI enables personalized and timely enablement of sellers throughout their career, including:

Personalized skill development: GenAI “listens” to sellers’ customer interactions such as calls, call scripts, and emails, to identify patterns of successful vs. unsuccessful approaches and outcomes, and related potential skill gaps. This data enables generation of seller-specific training content and prompts with actionable tips relevant to their needs such as “extend trial by 30 days” - all embedded directly into their learning platform and sales cadencing and CRM tools.

On-demand self-serve training: GenAI surfaces on-demand training in response to seller inputs on client and deal-specific scenarios such as “cross-selling to Enterprise tech customers at risk of churn.” GenAI and AI solutions analyze the customer base and other sellers’ successful tactics / skills in similar scenarios and recommend proven sales tactics, skill focus areas, and / or product-specific training.

IMPACT

- Improved deal close rates with real-time sales training and tactics that apply to specific client scenarios and seller needs
- Expedited new hire onboarding and upskilling through self-serve capabilities that go beyond static, standardized training
- Augmented sales management layers that can do more with less, using insights on team and individual performance to provide customized coaching and shift away from training reps based on static material as well as share best practices across teams

Territory assignment, quota-setting, and commission planning strategy at a global investment bank



CHALLENGE

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

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

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

What if quota-setting systems were enabled with GenAI tools and consistent quota planning was automated at scale?

SOLUTION

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

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

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

IMPACT

- Informed and improved decision-making based on expedited target-setting analysis comparing various scenarios. AI capabilities enabled more realistic targets, motivating sales reps and leading to better performance
- Produced transparent and intuitive reports for sales reps with capabilities to deduce incentive calculations, thereby gaining sales reps' trust and aligning them with company strategy
- Minimized manual effort of tracking and maintaining edge cases in different versions, thus reducing the time to roll-out targets

Functional Domain Deep Dive

Commerce

04



Introduction: GenAI and Commerce

GenAI has the potential to revolutionize customer engagement around purchasing events and drive a fundamentally different nature of purchasing interactions between organizations and their customers.

Customer Journeys

GenAI equips businesses with powerful tools for customer support during purchases, offering hyper-personalization and custom recommendations. GenAI interfaces take real-time queries, furnish contextual and enhanced product details, and resolve "last mile" challenges, minimizing instances of cart abandonment. Additionally, GenAI can generate personalized images and product content relevant to individual customers and their shopping preferences.

B2B Procurement and Partner Commerce

GenAI can transform interactions between B2B organizations and their customers, particularly around corporate buying and procurement. Buyers can benefit from advanced virtual assistance when purchasing complex products and / or exploring sophisticated purchasing contracts. GenAI harnesses multiple internal and external data sources, including product documentation, purchase history, pricing options, cross-sell / up-sell possibilities, supply chain limitations, market conditions, and logistics.

KEY POTENTIAL BENEFITS FOR COMMERCE

- **Reduce cart abandonment to increase sales** by delivering hyper-personalized buying experiences, including search and product recommendations, and addressing customer questions and issues in real-time during transactions.
- **Enhance buyer relationships and business interactions** by providing sophisticated virtual assistance to B2B customers during complex purchases. GenAI can provide continuous engagement with product information, pricing and purchasing options, distribution and delivery schedules, and recommendations for contracting alternatives.
- **Enhance commerce solution customization** by using GenAI code assist tools and test automation capabilities to continuously enhance digital commerce channels and deliver new capabilities to market, faster.

GenAI has the potential to revolutionize the digital commerce space, with impact on both B2C and B2B interactions. To take full advantage of opportunities unlocked by GenAI, it is important to consider unique needs and implications around engaging with both B2B and B2C stakeholders.

One key consideration pertains to data inputs. For B2B, the focus may be on protecting proprietary data, whereas in a B2C setting, ensuring customer privacy is critical. Regardless of the setting, approaching GenAI opportunities with the end-to-end lifecycle in mind can help ensure critical considerations are explored.

In this chapter we explore the following use cases: Streamlined Shopping Experience, Hyper-Personalized Search Results, Dynamic Product Information Management, and Optimized Purchase Plans

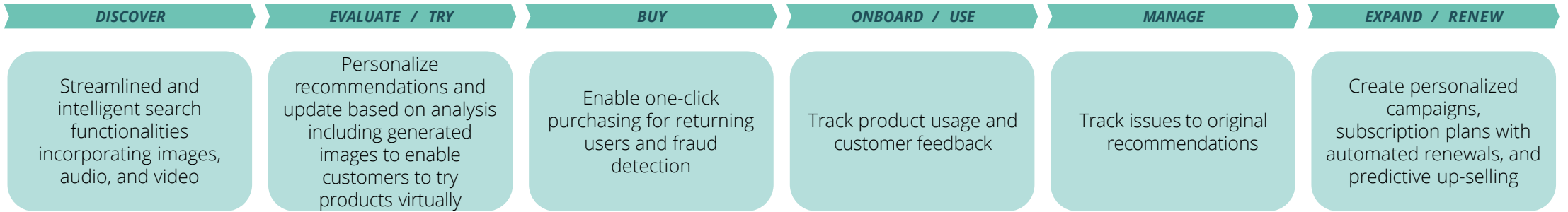
GenAI Capabilities and Use Cases for Commerce

Whether B2C or B2B, GenAI gives companies an opportunity to rethink and improve search, cart expansion, and buying patterns

What AI can do for:

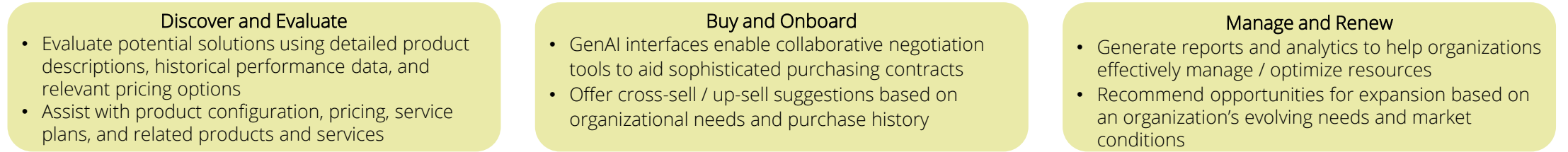


CUSTOMERS

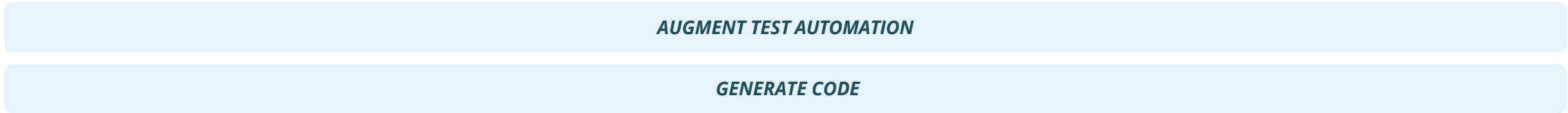


COMMERCE USE CASES TYPICALLY SPAN THE ENTIRE CUSTOMER JOURNEY

B2B PROCUREMENT & PARTNER COMMERCE



COMMERCE SOLUTIONS



Value Provided

CUSTOMER CROSS-JOURNEY POTENTIAL BENEFITS

- Improved customer experience
- More personalized offers
- Improved self-serve capabilities
- More intelligent, better fit re-purchase recommendations

COMPANY CROSS-JOURNEY POTENTIAL BENEFITS

- Increased competitive opportunity
- Improved cart size
- Improved win rate
- Continuous learning about customers
- Improved post-purchase recommendations and service

Streamlined Shopping Experience

Retail customer: Streamlining and enhancing sales

GenAI enables customers to conduct more than a simple search. For example, they can upload pictures of an outfit and have GenAI provide recommendations to accessorize. This improves customer engagement through meaningful personalization.

Issues and opportunities

When shopping for apparel, customers must search for each item individually, and may not know what they need. Conventional searches are time-consuming and often lack knowledge of a specific customer's needs, since the tools are built with generic customer profiles in mind.

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

How GenAI can help

- 1. Intuitive search:** A customer can upload a photo of an outfit or even a selfie of themselves wearing an outfit to initiate a search. They can add keywords describing what they are looking for in terms of style, color, or other requirements.
- 2. Personalized recommendations:** GenAI can create an updated photo with additional items, showing how the new ensemble will look. This could include jewelry, additional clothing, and shoes.
- 3. Enhanced feedback loop:** When customers provide feedback (like / dislike), GenAI can refine recommendations and create an updated photo of the proposed outfit. This step can be repeated to refine the search.
- 4. Streamlined shopping experience:** Once the customer decides they like the image generated, GenAI can create a shopping list for the customer, who can de-select items they already have or adjust the list as needed.

This applies if you have...

- Low conversion rates from browsing to purchasing
- Increasing browsing time without purchase
- Decreasing customer satisfaction

Potential benefits



Improved customer engagement

Highly relevant product recommendations better fulfill customer needs, enabling more meaningful customer relationships



Personalization at scale

Automation enables personalizing each individual's results based on their unique preferences, rather than applying a persona-based approach to broad audiences



Efficiency and time savings

Free customers from time-consuming, manual searches and unlock higher cart values

Hyper-Personalized Search Results

Search functions optimized: Leveraging natural conversation and GenAI to enrich search results

GenAI has the potential to improve searches for products and services through pattern recognition and natural language queries, improving search results and offer personalization.

Issues and opportunities

Search functionalities can be static in nature and programmed for broad customer needs instead of returning personalized results, leading to sub-optimal responses provided to customers.

GenAI has real potential to optimize and enrich the customer experience through its capacity to mimic natural conversations. B2B ecommerce brands can leverage GenAI search to address complex and technical queries, provide extensive context and explanation on product use, and generate tailored responses leveraging video, audio, and text customized to the user type, device, and query.

How GenAI can help

- 1. Natural language-based search:** With GenAI, customers can use natural language to conduct searches. For example, a customer could state: "I own a farm and want to increase my crop nutrition. Please suggest fertilizer options with high nutrient content that I can buy." GenAI can convert this natural language into a query to find appropriate results, thereby changing complex searches for a wide variety of B2B industry products and significantly simplifying product discovery
- 2. Data-driven, personalized results:** In response to a customer search for a product with specific usage or other characteristics, GenAI can analyze broad sets of structured and unstructured (e.g., voice) search data to identify patterns across similar searches. GenAI can then generate results / recommendations for products that are more likely to resonate with the customer's true needs, based on search behaviors across large populations.

This applies if you have...

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

Potential benefits



Targeted recommendations

Deliver search results and recommendations that meet customers' true needs rather than the needs of generic customer personas



Increased conversion

Drive personalization for customers to foster stronger connections which will result in higher conversions and sales



Reduced operational costs

As customers receive the information they are looking for from self-service channels, use of those channels increases, reducing reliance on costlier channels

Dynamic Product Information Management

PIM process streamlined: Automatically-generated product descriptions for customers

GenAI can accelerate and improve Product Information Management (PIM) processes by generating product descriptions, information, and pictures, improving speed to market.

Issues and opportunities

Generating text and content for a product catalog and associated PIM data can be a time-consuming, manual process.

GenAI can speed this up, generating product descriptions, product categorization, searchable tags, and many other product attributes including pictures from a single image.

How GenAI can help

- 1. Accelerated product content development:**
GenAI can quickly create a product description and other attributes of products from photos.
- 2. Themed catalog and product information:**
Whether for a particular catalog or all of an organization's products, GenAI can write product descriptions with a theme (e.g., a holiday), ensuring details remain consistent across the product portfolio.
- 3. Enhanced, dynamic product visualization:** GenAI can generate 3D images from a single photo. This capability augments the photos already used in a company's online product catalog.

This applies if you have...

- Long or increasing time to develop content for new products
- High-cost PIM processes

Potential benefits



Faster time-to-market

Streamline product development processes and improve overall new product launch timelines



Improved quality

Improve consistency of product catalog content through application of similar processes



Increased evaluations

Visualizations allow customers to easily evaluate and virtually try products

Optimized Purchase Plans

Bespoke buying plans: Generating meaningful insights with complex algorithms

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

Issues and opportunities

Data warehouses have made it easy for companies to store customer data. However, having data and being able to act on it are two different things. There are challenges in analyzing large data sets with both numerical and language-based data and combining the analyses into meaningful insights.

GenAI can mine data on B2B relationships and generate a recommended buying plan with estimated immediate and longer-term product needs. Providing B2B customers with tailored buying plans can help reduce buyers' time spent researching and buying products, and plans can be refined based on buyer feedback.

How GenAI can help

- 1. Planning and forecasting optimization:** GenAI enables companies to update their buying plans based on market events. For example, news on a key supplier's expansion could inform an updated buying plan reflecting the company's increased quantity requirements.
- 2. Sales expansion:** GenAI can analyze buying patterns across a B2B company's customer base to recommend additional products for a specific customer based on similar organizations' buying behaviors.
- 3. Customer satisfaction and retention:** By optimizing companies' purchase plans, GenAI can help improve product availability (downstream), pricing, and customer satisfaction.

This applies if you have...

- Difficulty analyzing patterns based on both numerical and natural language insights
- Frustrated B2B customers struggling to keep up with purchasing to meet demand

Potential benefits



Improved experience

Improve B2B buyer experience by understanding their needs more accurately



Increased sales

Drive sales using advanced buying recommendations based on analysis of orders across all partners



Improved loyalty

With personalized, data-driven engagement, sellers can build strong relationship with customers



Next-gen shopping experience for industry-leading grocers

CHALLENGE

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

During June and July of 2023, Deloitte surveyed 100 senior executives from US grocery retailers with over 10,000 employees about the future of their industry.¹ The survey revealed optimism is growing among industry insiders around the financial benefits of GenAI, with 40% expecting revenue growth or cost savings. However, 49% believe it is premature to predict, and the remaining 11% are pessimistic about GenAI. A substantial portion (over 40%) of surveyed executives anticipate using GenAI in their businesses by 2024.

How might these grocery retailers find new competitive advantages through GenAI?

SOLUTION

A promising GenAI application is a "customer assistant," which encompasses customer service, meal planning (with associated shopping lists), and proactive on-sale alerts.

This automated assistant can capture a customer's shopping details (e.g., shopping for a week for a family of four, with healthy eating goals) and leverage GenAI to develop a list of dishes plus side items that pair well. The assistant can also incorporate user feedback to improve recommendations over time.

As the recommendations improve, so would the grocer's understanding of customer behavior and trends. This would improve forecasts and increase supply chain efficiencies.

IMPACT

- Increased customer loyalty and sales
- Unlocked opportunities for cross-merchandising and cross-promotion
- Improved product inventory planning based on customer interaction data
- More advanced, efficient forecasting to better predict demand and reduce food waste

¹ Deloitte – *The Future of Grocery Retail, June and July 2023*



AI-enabled product assortment planning in manufacturing

CHALLENGE

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

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

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

SOLUTION

To improve accuracy and confidence in digital channels, a manufacturer transformed its B2B ecommerce website for its retail partners and mapped out customer use cases. The solution included the enterprise application architecture and the capability map, centered around the Salesforce platform and leveraging Einstein as the AI Brain for intent recognition. Back-end applications were also included through an application programming interface (API) gateway.

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

IMPACT

- The Salesforce-enabled transformation improved the distributor's website, helping customers (retailers) better identify which products to buy, resulting in a 7% increase in sales
- Improved sales by ~4% for manufacturers by capturing the lost revenue
- Improved inventory forecasting helped to achieve 95% "available to promise" inventory levels (i.e., inventory guaranteed in stock to fulfill future orders)

Functional Domain Deep Dive

Service

05



Introduction: GenAI and Service

Service organizations are being transformed with use of GenAI through self-service bots and personalized service interactions.

As customers increasingly have the power to control their experiences and tailor products and services to meet their needs, service remains a critical area where customer needs must be met efficiently and effectively by organizations. For years, companies have attempted to leverage chatbots and self-service solutions to help customers, yet many customers have grown frustrated with limitations of the technology, which has not improved wait times, requires them to repeat themselves, or entails multiple redirects to get answers to their problems.

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

KEY POTENTIAL BENEFITS FOR SERVICE

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

The increase in quality of chatbots and self-serve solutions can minimize the need to engage one-on-one with an agent. Those who do need to speak to someone can be triaged to the right agent who can solve their problem in the first conversation.

As a service agent, these self-service solutions unlock capacity for more strategic and valuable work and more focused one-on-one engagement, which can subsequently increase agent satisfaction.

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

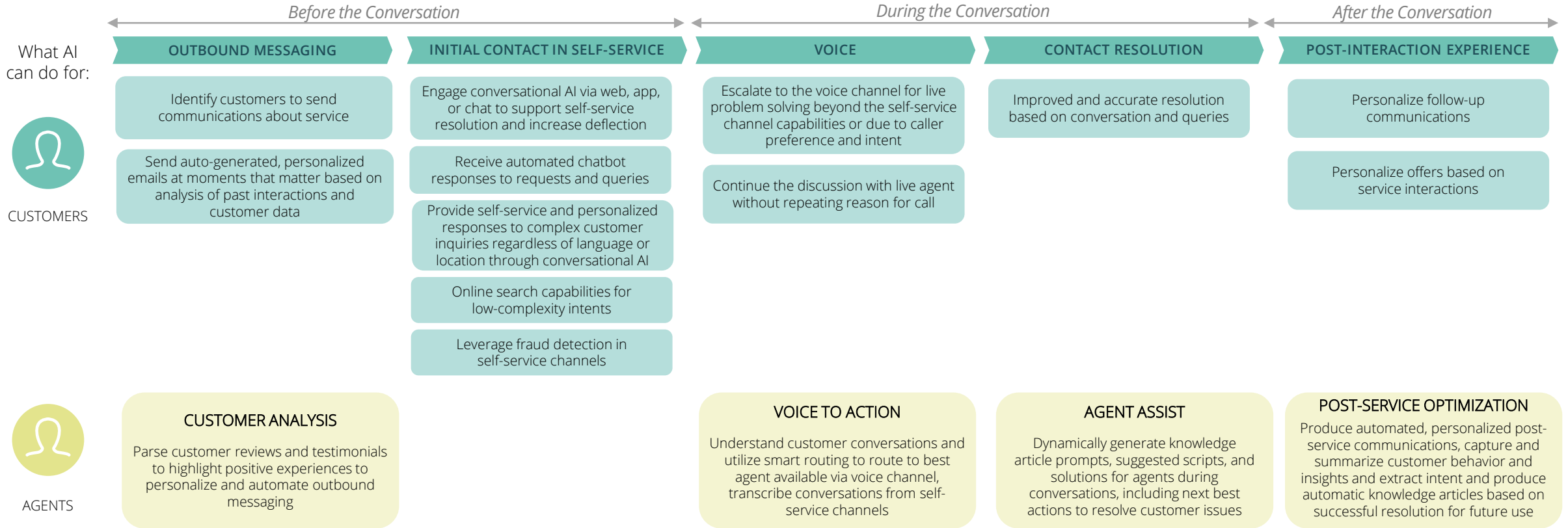
In this chapter, we explore the following use cases: Time to Resolution and Agent Assist

Would you like to connect with our AI leaders?

[**REQUEST A MEETING**](#)

GenAI capabilities and use cases for service

GenAI can be layered into the existing customer journey to improve customer and employee experience and to drive efficiency



Value Provided

CUSTOMER CROSS-JOURNEY POTENTIAL BENEFITS

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

AGENT CROSS-JOURNEY POTENTIAL BENEFITS

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

Time to Resolution

Reactive to proactive: Service customers with real-time support

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

Issues and opportunities

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

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

How GenAI can help

- 1. Virtual ask me anything:** Enable virtual agents and chatbots to answer unplanned for and open-ended questions leveraging client's proprietary data and large language models (LLMs) to get answers without escalating to agents. Facilitate the process and mitigate risk by leveraging human oversight to help ensure responses are validated, accurate, and positioned correctly.
- 2. Voice to action:** Leverage GenAI to summarize voice transcripts and customer details, providing greater context to agents as they take calls – reducing handle time and improving the customer experience. Use GenAI to streamline the call wrap-up process (summarize voice transcripts to call-out key topics, identify call types, set disposition, and identify next steps).
- 3. Personalization:** GenAI can rapidly generate personalized messages for resolution for customers based on their true issue at hand, reducing manual agent activities in crafting messages.

This applies if you have...

- Decreasing customer satisfaction (CSAT) scores
- Low agent productivity
- High service costs

Potential benefits



Improve customer experience

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



Enhance efficiency and productivity

Increase productivity by decreasing agent handle time with GenAI features that streamline the conversation and lower the time it takes agents to find critical information



Decrease cost

Decrease costs by providing greater functionality to increase containment within intelligent virtual agents (IVAs)

Agent Assist

Contextualize every conversation: Summarize information needed to serve customers

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

Issues and opportunities

Agents often encounter questions on topics they are unfamiliar with. Traditionally, this would require detailed searching through documentation or knowledge bases, or asking a supervisor / colleague, increasing agent handle time and cost-to-serve.

Agents often need to digest large amounts of information while interacting with customers, which can be time-consuming and lead to misunderstanding. In many situations, an agent may lack insight into previous interactions when a customer engaged with a self-service solution or another agent (in the case of escalations or transfers).

GenAI can quickly summarize interactions in a consumable fashion and provide the agent with information needed to serve the customer in real-time.

How GenAI can help

- 1. Understand the customer:** GenAI and LLMs can analyze a customer's profile and their self-service, voice, and email interactions to identify potential issues and support better servicing.
- 2. Agent assist:** GenAI can provide self-service capabilities for agents to input information and receive prompts, resolution scripts, techniques, and knowledge articles. GenAI can also proactively push training / knowledge articles relevant to an agent's work to decrease time to proficiency.
- 3. Cross-sell:** By understanding the customer more holistically, GenAI can generate recommendations on additional product features and services to agents as next best actions, or directly to customers as automated and personalized outbound messages for improved cross-sell.

This applies if you have...

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

Potential benefits



Better customer experience

Understanding the customer better can improve issue resolution time



Reduce time to proficiency

With GenAI, agents can get relevant prompts in real-time and access to knowledge articles and training to become more proficient in their jobs, helping them solve customer issues faster



Increase revenue through cross-sell

A deeper understanding of customers allows organizations to cross-sell in a more targeted and meaningful manner



AI digital assistant transformation

CHALLENGE

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

The center's technology grew outdated and needed significant re-thinking and revamping, as customer expectations continued to increase.

Customer demographics were also changing, with younger users comprising a larger share of the customer base. This segment had unique demands in how they preferred to interact with customer service, and what they expected from a service provider, accelerating the organization's need to embark on transformation.

What if GenAI could effectively handle a great deal of customer contacts automatically, while routing the contacts it couldn't handle to a live agent?

SOLUTION

The approach was to transform the call center into a contact center of the future and map out architecturally significant customer user cases. A critical piece was the development of the enterprise application architecture, architecture decision records, and the capability map, centered around Google's Contact Center AI (CCAI) platform, leveraging Dialogflow as the AI Brain for intent recognition, while integrating with Interactive Voice Response (IVR), CRM, and other back-end applications through an application programming interface (API) gateway.

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

IMPACT

- Implementation of all prioritized omnichannel use cases in the voice / chat / SMS AI channels is targeted to drive net savings of \$500 million on an annualized basis

"AI in the cloud" generated exemplary results:

- Over 30 million annual calls handled by the VVA in production
- 90% containment rate (i.e., calls never get to a human)
- \$150 million in savings realized
- Rate of payment collection increased by 2X



Service transformation focused on transfer rate reduction

CHALLENGE

Following the implementation of a new contact center platform and conversational AI capabilities into their Interactive Voice Response (IVR), a bank saw its transfer rate increase to 40%.

This, in turn, drove issues with servicing inefficiency, declining customer satisfaction, rising costs, and falling first contact resolution rates.

A “tech only” approach to the challenge was not yielding results, as it did not address the entirety of the problem, including underlying service processes and customer and employee insights.

What if GenAI could help analyze internal data across the contact center to minimize transfer rates?

SOLUTION

A GenAI solution tackled the transfer rate across three stages within contact center engagement: (1) Before the client reached the agent; (2) in the IVR; (3) after the call was routed to an agent. This dynamic tactic allowed for technology implementation and human behavioral change to address the rising transfer rate simultaneously.

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

Instituting a new Natural Language Understanding (NLU) model and integrating new intents addressed gaps in technology and processes to produce a higher-performing IVR.

IMPACT

- Reduced transfers by one third, translating to saving over 2,300 transfers daily
- Total client interaction time decreased from an average of ~27 minutes in July 2022 to ~20 minutes since March 2023
- Overall customer satisfaction score went from 4.17 to 4.26 from July 2022 to April 2023; CSAT scores related to automated phone prompts have increased from 3.67 to 3.73 and CSAT scores related to transactional phone transfers have increased from 3.96 to 4.10



US auto finance captive omnichannel strategy and capability planning

CHALLENGE

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

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

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

What if GenAI could expand the digital-first experience while simultaneously increasing issue resolution effectiveness?

SOLUTION

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

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

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

IMPACT

- Self-service capabilities expedited handling of lower-complexity interactions through a customer's channel of choice, leading to reduced customer effort
- Consolidating the technology stack and moving to a telephony platform with a more advantageous cost model reduced technology spend by up to \$4 million

These new capabilities and omnichannel AI technology can yield up to \$39 million in labor cost savings through contact containment and expedited call handling.

Functional Domain Deep Dive

Customer Success

06



Introduction: GenAI and Customer Success

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

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

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

GenAI capabilities can begin with automating these manual Customer Success Manager (CSM) tasks to free up capacity to focus on helping customers drive adoption and value realization.

KEY POTENTIAL BENEFITS FOR CUSTOMER SUCCESS

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

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

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

In this chapter we explore the following use cases: Time-to-Value, Customer Value Realization, and Customer Expansion

Would you like to connect with our AI leaders?

[**REQUEST A MEETING**](#)

GenAI capabilities and use cases for Customer Success

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

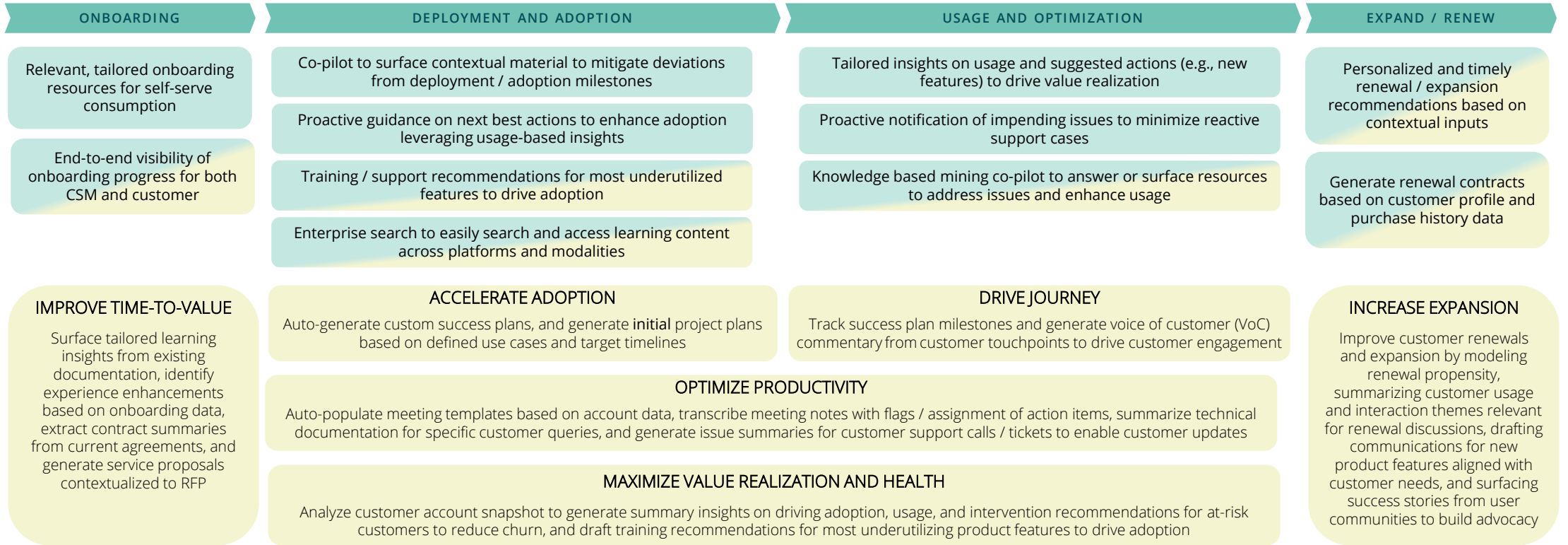
What AI can do for:



CUSTOMERS



CUSTOMER SUCCESS MANAGERS (CSM)



CUSTOMER CROSS-JOURNEY POTENTIAL BENEFITS

- Faster time-to-value
- Maximized value capture for customers
- Improved, faster onboarding
- Personalized, relevant renewals
- Improved customer experience and self-service

CSM CROSS-JOURNEY POTENTIAL BENEFITS

- Accelerated adoption leading to increased customer stickiness and reduced churn risk
- Reduced CSM manual efforts in routine and periodic tasks
- Proactive mitigation for at-risk customers
- Focus of CSM teams towards value milestones instead of document creation / maintenance
- Outcome-focused renewal conversations
- Proactive mitigation for at-risk customers

Value Provided

Time-to-Value

Virtuous cycle of value creation: Using GenAI to establish a positive effect on value realization

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

Issues and opportunities

Onboarding is the most widely received Customer Success service¹ and if ably executed, can establish a gateway for future interactions and up-sell / cross-sell opportunities.

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

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

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

How GenAI can help

- 1. Personalized onboarding:** GenAI can generate custom onboarding plans and training material tailored to the customer's products, use cases, technical environment, and prior usage history allowing for accelerated onboarding and reducing manual effort required by CSMs.
- 2. Training co-pilot:** GenAI can act as a training co-pilot for customers to surface relevant training material contextualized for specific scenarios providing self-service ability to proactively mitigate milestone deviation. The co-pilot can also be used by CSMs to build mini knowledge capsules by extracting learning insights from existing product sheets / documentation.
- 3. Proactive intervention:** GenAI embedded in the product can track FTTV realization and provide customers taking a longer FTTV with personalized actionable recommendations and insights driven suggested next steps to expedite onboarding.

This applies if you have...

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

Potential benefits



Accelerated FTTV

Accelerated onboarding and deployment allowing for a faster adoption ramp



Improved customer experience

Self-service options for customers to manage onboarding / deployment according to their needs, and enhanced ability to realize / demonstrate value



Enhanced CSM productivity

Minimized manual and time-consuming tasks allowing for proactive customer management

Customer Expansion

Evolving expansion: Adapting product fit through holistic understanding and team approach

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

Issues and opportunities

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

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

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

How GenAI can help

- 1. Drive up-sell and cross-sell opportunities:** GenAI can summarize product release notes to associate features with customer needs / usage patterns, thereby drafting targeted and contextual up-sell and cross-sell communications.
- 2. Auto-generated renewal contracts:** Using customer profile and purchase history data, GenAI can auto-generate renewal contracts minimizing manual CSM work and driving consistency in templates.
- 3. Surface themes for renewal discussion:** In the lead up to renewal discussions, GenAI can analyze customer call notes, support cases, survey results, usage patterns to highlight most relevant customer themes for CSM and broader account team.
- 4. Enhance at-risk account management:** In combination with predictive AI capabilities, GenAI can enable CSMs to focus on their most risky accounts by summarizing renewal propensity analysis outputs at scale and providing insights and commentary on key risk drivers.

This applies if you have...

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

Potential benefits



Account expansion

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



Renewal effectiveness

Enhance effectiveness by leveraging a robust 360 degree understanding of customers' past experiences and value captured from the product



Accelerated renewal process

Improve renewal process efficiency by automating and standardizing manual tasks such as generating new renewal contracts

Customer Value Realization

Focused CSM efforts: Using GenAI to drive adoption and value realization across the customer journey

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

Issues and opportunities

Customers today are increasingly expecting solutions that deliver business outcomes and while ~90% discuss business objectives with providers, less than one third are eventually satisfied with value realized.

This is driven in large part by companies struggling to effectively organize customer data and develop a full view of the customer account, forcing CSMs to undertake time-consuming manual activities to meet baseline needs. For example, ~35% of CSM time is spent on compiling account updates and customer information from various tools, ~33% on curating materials, and driving follow-ups post customer meetings, and ~15% on basic creation and maintenance of Success Plans and milestones.

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

How GenAI can help

- 1. Customer account insights:** GenAI can analyze a customer account snapshot on usage, support history, and feedback (created using traditional data or AI capabilities) to generate account level commentary on insights for driving customer engagement, increasing adoption of new product features, and intervention recommendations for customers at risk for churn.
- 2. Success plan creation and tracking:** Using an initial set of inputs related to customer profile and deal information, GenAI can create customer specific success plans with pre-populated goals, milestones and actions, and then analyze product telemetry data to track progress against key value milestones.
- 3. Customer communication automation:** GenAI can be leveraged to analyze account / product data to auto-populate meeting templates with summary of usage and health trends, along with transcribing meetings and analyzing contents to capture, summarize and socialize important takeaways and action items.

This applies if you have...

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

Potential benefits



Increased product stickiness

Higher adoption of product features and accelerated realization of customer outcomes through enhanced success plan tracking



Enhanced customer outcomes focus

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



Increased customer retention

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



Customer Success virtual assistant

CHALLENGE

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

This process of searching for product details is cumbersome, tedious, and prone to errors, which can result in a dissatisfactory customer experience.

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

SOLUTION

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

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

- Parse and index a given enterprise dataset
- Perform semantic search on entire dataset based on a given user query
- Customize prompts as per the needs of the enterprise
- Leverage GenAI model to generate Natural Language Response to a given user query

IMPACT

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

An AI foundry to scale out this Proof of Concept (PoC) is anticipated to provide the following benefits:

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



Customer Success GenAI strategy development

CHALLENGE

A leading cyber-security company was looking to define their Customer Success AI strategy and prioritize areas most conducive to GenAI based interventions to remove CSM productivity blockers and enhance customer experience.

To operationalize this strategy, the company wanted to also develop AI automation roadmap with prioritization and sequencing of AI roll-outs based on business impact, deliverable complexity, and time-to-value.

SOLUTION

Deloitte conducted a CS experience design workshop followed by 15 CSM interviews and a comprehensive survey of ~150 CS participants to identify capture experience needs and understand productivity blockers.

This exercise identified four activity areas consuming 93% of CS time, for AI / automation use case development:

- Manually gathering insights from siloed tools
- Preparing material for quarterly business reviews (QBRs) and follow-ups
- Managing success / get-well plans
- Tracking support cases and escalations

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

IMPACT

Survey results and priority 6-8 Customer Success use cases were presented to the CEO and received approval for execution with a goal to drive 25% improvement in productivity.

Use case execution has been channeled into AI Center of Excellence, intersections with data within CRM and CS tools have been defined, and the company is currently commencing work of detailed development of AI scenario tracks.

Building trust with customers is a key step in realizing the full potential of GenAI

Context

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

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

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

The Human Challenges of GenAI

- 1. Data abuse:** Data can be inappropriately used, with heightened concerns about surveillance, privacy, and potential infringement of intellectual property
- 2. Bias and misinformation:** Data biases could propagate both unintentionally and intentionally:
 - Biases in training data (e.g., sexism, racism, over- / under-representation of a population cohort) could result in outputs generated that exhibit biases as well
 - Intentional spread of misinformation
- 3. Human empathy:** Algorithms and models lacking empathy, with difficulty in finding the “right” value system for guardrails

How AI Can Erode Trust

The following data points on the impact of AI with customer trust were derived from a survey of 500 respondents administered in August 2023¹.

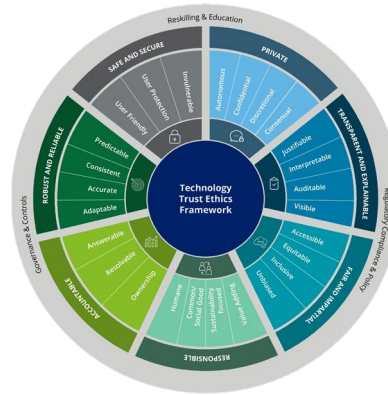
- Trust in a brand decreases by 12.3x amongst customers who know the brand uses AI
- Customers view brands that leverage AI representatives for customer interactions as 6.3x less reliable than brands that use human representatives
- Workers are also skeptical of AI and perceive their employer as 2.3x less trustworthy when AI-enabled tools are integrated into their workflows as compared to non-AI tools
- During issue resolution at a contact center,
 - Customers have 51% lower trust when their issue is addressed by a bot vs. a human
 - Customers view a brand as 65% less capable when their issue is addressed by a bot vs. a human, the largest relative decrease across the Four Factors (Humanity, Transparency, Capability, Reliability)

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

To build trust around GenAI, two elements must be addressed...

1. The Machine Elements

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



Trustworthy AI Framework

2. The "Human" Elements

Often overlooked, the "human" elements: a deep understanding of both the workers and customers who will use these models, and how to address the very real human feelings of uncertainty, mistrust, or at times fear of these new technologies.



Deloitte's TrustID™

Bringing trusted GenAI for CRMs to life requires considering these questions



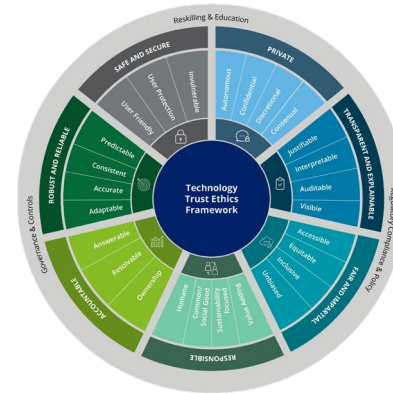
The Machine: Inputs

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



The Machine: Outputs

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



Trustworthy AI Framework

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

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



The Human: Workers

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



The Human: Customers

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



Deloitte's TrustID™

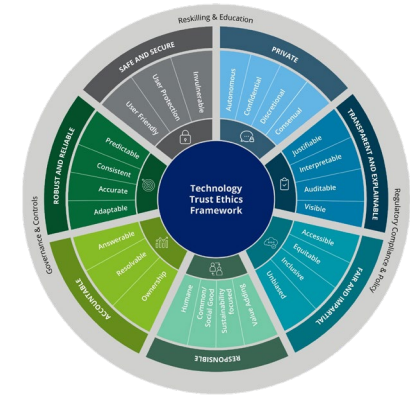
Apply the four factors of TrustID to predict how emotions will impact customer, worker, and partner behaviors:

- Humanity
- Transparency
- Capability
- Reliability

How can the input data be trusted?

How might organizations...

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



Powered by [Trustworthy AI Framework](#)

Secure data

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

Use trusted data sources

One of the best ways to trust the input data is to feed the GenAI model data that is yours. Compile a list of known, trusted content sources (e.g., first-party data from customer data platform) and prompt GenAI to create content using those trusted sources. This also requires robust data governance to manage any data changes to these sources to avoid any negative impact to the GenAI model.

Develop a supporting operating model

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

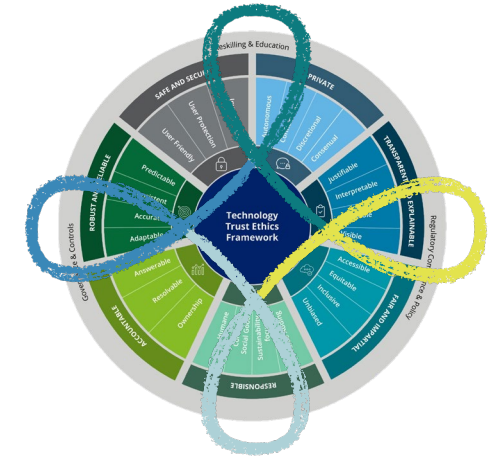
Align on proper data ownership

With different types of data being used to make the GenAI algorithm more robust and with more third parties becoming involved with the technology, it is key for businesses to identify upfront who owns which pieces of data used. Ensure that all data rights have been cleared before inputting it into the GenAI model.

How can the GenAI content be trusted?

How might organizations...

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



Powered by [Trustworthy AI Framework](#)

Maintain a human in the loop

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

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

1. GenAI model to provide an initial draft of the email

- Human (salesperson) prompts the GenAI tool (e.g., OpenAI) to generate content using the list of known, trusted sources (e.g., a business's own first-party data within its customer data platform)
- GenAI tool creates an initial draft

2. Human to decide whether to take action

- Salesperson reviews the initial draft (GenAI output), and makes adjustments / direct edits as needed
- Determine whether email is complete and then send out to the customer

Incorporate Reinforcement Learning from Human Feedback (RLHF)

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

How will workers trust and embrace AI?

How might organizations...

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



Powered by [TrustID™](#)

Understand the worker

Getting workers bought-in on working with GenAI requires understanding what employees are motivated by and anticipating how they could respond to integration of GenAI into their current workflows. There are tools like TrustID™ to measure worker trust sentiments today (example: “I am a top salesperson and always doubling my quota”) vs. tomorrow (example: “my unique communication style that has made me a top seller is now being used by our GenAI to help other salespeople outperform me”).

Focus on productivity benefits to improve the current business

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

Develop an innovation process to drive new business growth

Identify new AI Tools that help expedite the research, synthesis, and prototyping in the innovation process. GenAI can be used in research and synthesis (generate themes and insights instantaneously and allow for more interviews) and rapid prototyping (accelerate ideation, create baseline prototypes, enhance design skillsets, and create formatting standards at a faster, more efficient pace).

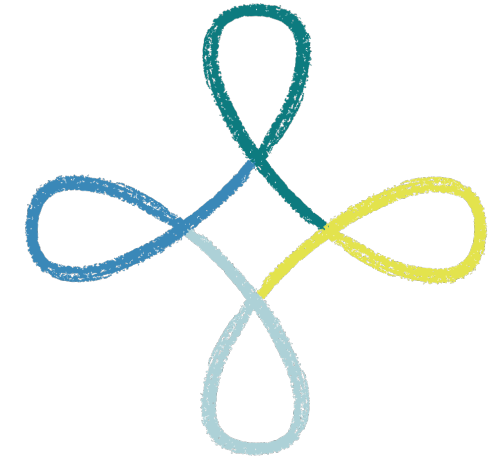
Prepare a change management plan

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

How satisfied and happy will customers be?

How might organizations...

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



Powered by [TrustID™](#)

Understand the customer

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

Evaluate products and services along the journey

Through journey mapping and service blueprint exercises, companies can understand when to use GenAI tools, human interaction, or a hybrid approach with customers. After completing ethnographic research to understand the consumer's needs, desires, and pain points, companies will be able to understand which moments require a genuine human interaction between consumer and company or if an AI powered human interaction will be appropriate during a specific moment in the user journey. Accompanying the journey with a service blueprint will help companies understand the underlying orchestration, technical capabilities, and required operations to achieve the ideal consumer scenario.

Develop an innovation process to drive new business growth

Identify new AI Tools that help expedite the research, synthesis, and prototyping in the innovation process. GenAI can be used in research and synthesis (generate themes and insights instantaneously and allow for more interviews) and rapid prototyping (accelerate ideation, create baseline prototypes, enhance design skillsets, and create formatting standards at a faster and more efficient pace).



Why trust matters in service interactions

Sample GenAI Applications	<p>Before Conversation</p> <p>Rather than waiting for a customer to reach out to a service center with a problem, businesses can auto-generate personalized emails tailored to a customer's unique situation and anticipate customer needs to time outreach around "moments that matter"</p>	<p>During Conversation</p> <p>When a customer has contact with a call center or service desk, use GenAI to create a knowledge article or customer response based on a prompt that addresses and resolves the customer's exact situation or issue in a rapid manner</p>	<p>After Conversation</p> <p>Once a live call is complete, access summaries, store new relevant data to the customer's information, access insights into customer needs, and identify cross-sell opportunities. Utilize auto-generated follow-up communications to customers</p>
Potential Trust Concerns	<p>Workers</p> <p>Fear their productivity and choices are being monitored more closely (impacting the training of the GenAI model), in addition to their job function being replaced</p> <p>Customers</p> <p>Ignore the outreach because the moment was not relevant to them, or feel concerned because they were unaware the company tracked that level of consumer data</p>	<p>Workers</p> <p>Today's most knowledgeable, well-trained call center representatives may fear increased competition now that other representatives have easy access to complex information</p> <p>Customers</p> <p>Frustrated with inconsistent service between representatives who know how to use GenAI efficiently (leading to faster issue resolution) and those who do not</p>	<p>Workers</p> <p>Time spent reviewing the GenAI output and if it's incorrect, having to rewrite everything anyway before it gets sent out</p> <p>Customers</p> <p>Can sense that AI was used given the speed and tone of the follow-up received; feel impersonal interacting with a machine and like the service representative or company doesn't care about them</p>
Applying TrustID™ to Take Action	<ul style="list-style-type: none"> • <u>Humanity</u>: Show workers how they can use their time more productively with other trainings or more creative tasks • <u>Capability</u>: See which types of moments customers respond well to, and stop sending notifications for ineffective moments 	<ul style="list-style-type: none"> • <u>Humanity</u>: Understand worker sentiment via ethnographic research and evaluate worker incentive structures • <u>Reliability</u>: Prioritize worker trainings on how to effectively prompt or use GenAI 	<ul style="list-style-type: none"> • <u>Capability</u>: Provide workers the opportunity to edit the follow-up before sending; see what edits the worker made and provide that feedback to the GenAI model • <u>Transparency</u>: Mention when GenAI is used in follow-ups to customers (vs. pretending it is from a human service representative)

The background of the slide is a solid light orange color with a pattern of thin, white, wavy lines that resemble topographic contour lines or a wood grain texture. These lines flow across the entire page, creating a sense of movement and depth.

How to Get Started with GenAI

08

How to Get Started with GenAI

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

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

Revisit the customer lifecycle and identify areas to add value

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

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

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

HIGH-LEVEL CUSTOMER LIFECYCLE

DISCOVER

EVALUATE / TRY

BUY

ONBOARD / USE

MANAGE

EXPAND / RENEW

Define a pilot program and be cognizant of the risks

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

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

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

POSSIBLE RISKS



Hallucination

Models might put out details that are factually false. Sources and citations are unavailable for most models



IP Protection and Infringement

SaaS-AI companies may save some or all prompt history for future training, which could lead to sensitive information leaks



Nuanced Inaccuracies

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



Malicious Behavior

GenAI tools may be targeted by adversaries to reveal sensitive information and / or take malicious actions on networks and data



Public Data Sources

Models are typically trained on public sources that are often unverified and can contain misinformation



Confidentiality and Privacy

GenAI tools are typically consumed as SaaS. Personally Identifiable Information (PII) shared may not comply with privacy laws



Bias In, Bias Out

Bias in training data (e.g., sexism, racism, over- / under-representation of a population cohort,) could result in outputs generated that exhibit biases



Cost

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



Model Performance

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



Ethical Use

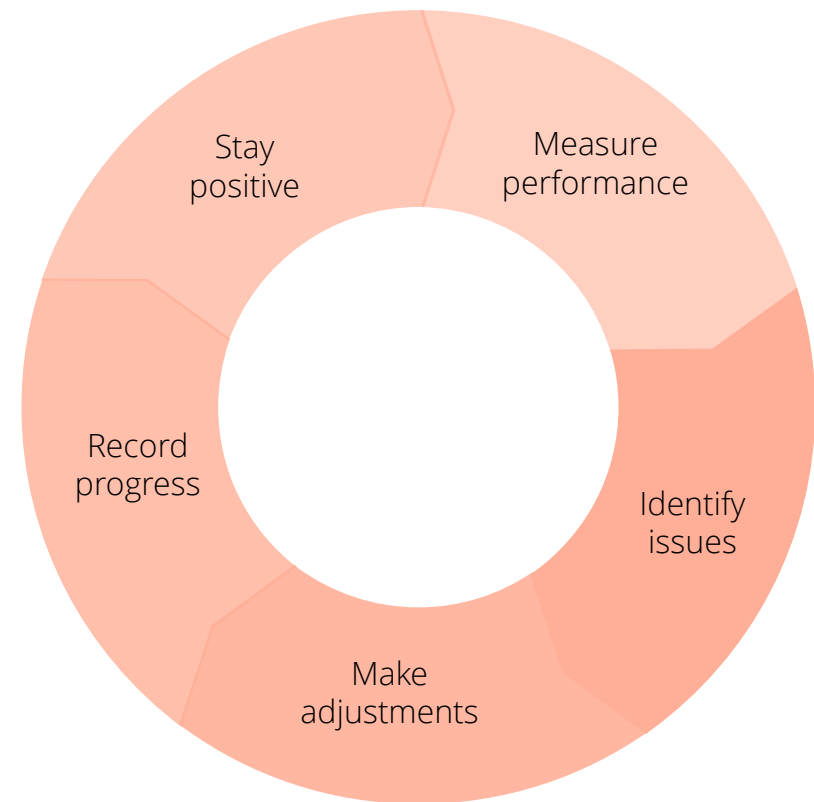
GenAI tools may be used in an unintended manner to circumvent laws, regulations, and organizational policies

Launch the pilot and iterate

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

This “fail fast, fail often” approach can provide a bias to action mentality and an ability to learn from mistakes without allowing them to derail the entire initiative or break team morale.

ITERATIVE PILOT APPROACH



Scale across the organization and codify

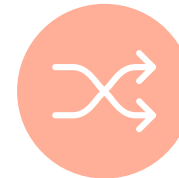
Once the pilot program is cruising, start thinking about where to go from here. What are the next use cases that could complement what has already been done? This is the point at which GenAI can begin to be woven into the fabric of an organization.

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

SCALING ENABLERS

**Governance:**

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

**Processes:**

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

**Technology:**

Select the right model(s), refine the technology stack to incorporate GenAI into what already exists, and leverage traditional AI to boost the value of GenAI

Keep exploring

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

The possibilities are endless.



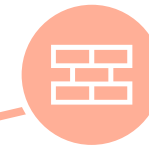
Pilot

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



Learn

Roll-out pilot to a wider audience to harden trust, value measurement and adoption strategies, prioritize overall use cases, develop use case roadmap, create business case, define AI Cloud architecture, and stand up an AI Center of Excellence for future use cases



Scale

Execute on roadmap to roll-out use cases across the enterprise with trust and adoption. Measure success, optimize the application for quality and cost, and manage the application landscape for operations

Conclusion

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Getting the most value from generative AI

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

The key to the first step is to start small but think big. According to a recent Deloitte survey¹ – State of AI in the Enterprise, 3rd Edition – 74% of businesses surveyed are still in the AI experimentation stage. At times lacking a clear vision of how all the pieces fit together, businesses are focused on modernizing their data for AI and building AI expertise through siloed pilot programs and proofs-of-concept. By contrast, only 26% of businesses surveyed are focused on deploying high-impact AI use cases at scale, which is when the real value kicks in.

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

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

Would you like to connect with our AI leaders?

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Acknowledgements

The Deloitte Digital leadership team expresses their deep gratitude to the following practice leaders and subject matter advisors for their sponsorship and contributions to the development and review of this report (in alphabetical order):

Abe Awasthi, Leor Bachar, JP Barcenas, Christine Cutten, Jatin Dave, Harry Datwani, Rachana Dharia, Amelia Dunlop, Marybeth D'Souza, Julie Ellis, Zach Faithful, Matt Fisher, Ed Johnson, Trinadha Kandi, Pankaj Kaushal, Jenny Kelly, Aftab Khanna, Matt Liffmann, Mark Lush, Tim McDougal, Simon McLain, Adam Messer, Simmi Mehta, Soumendra Mohapatra, Georg Muller, Sid Muthiah, Pratyush Nutalapati, Martin Rankin, Kate Schmidt, Christian Slike, Mark Singer, Charan Singh, Bonny Smith, Brian Smith, Gopal Srinivasan, Lauren Teegarden, Paul Vinogradov, and Claudine Webster.

The Deloitte Digital leadership team also expresses their appreciation and recognition for the following individuals who helped to ideate, plan, manage, research, design, and edit this report – and without whom this report would not have been possible (in alphabetical order):

Joel Andrade, Christopher Chen, Ashley Cook, Garima Dubey, Akshit Gupta, Nick Gulson, Courtney Hasselbach, Lisa Iliff, Jay Lee, Katharine Kong, Michael Perry, Teemu Rajala, Jeffrey Samotny, Rahul Saxena, Duke Schaeffer, Tom Shanahan, Jesse Smith, Pooja Warudkar, Macy Wilbanks, and Dawn Xiang.

Thank you.

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