



Welcome to Our Webinar!

Customer Engagement 2019: Trends, Predictions & Priorities

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FORRESTER[®]

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 **NUANCE**

 @KalikaMarina

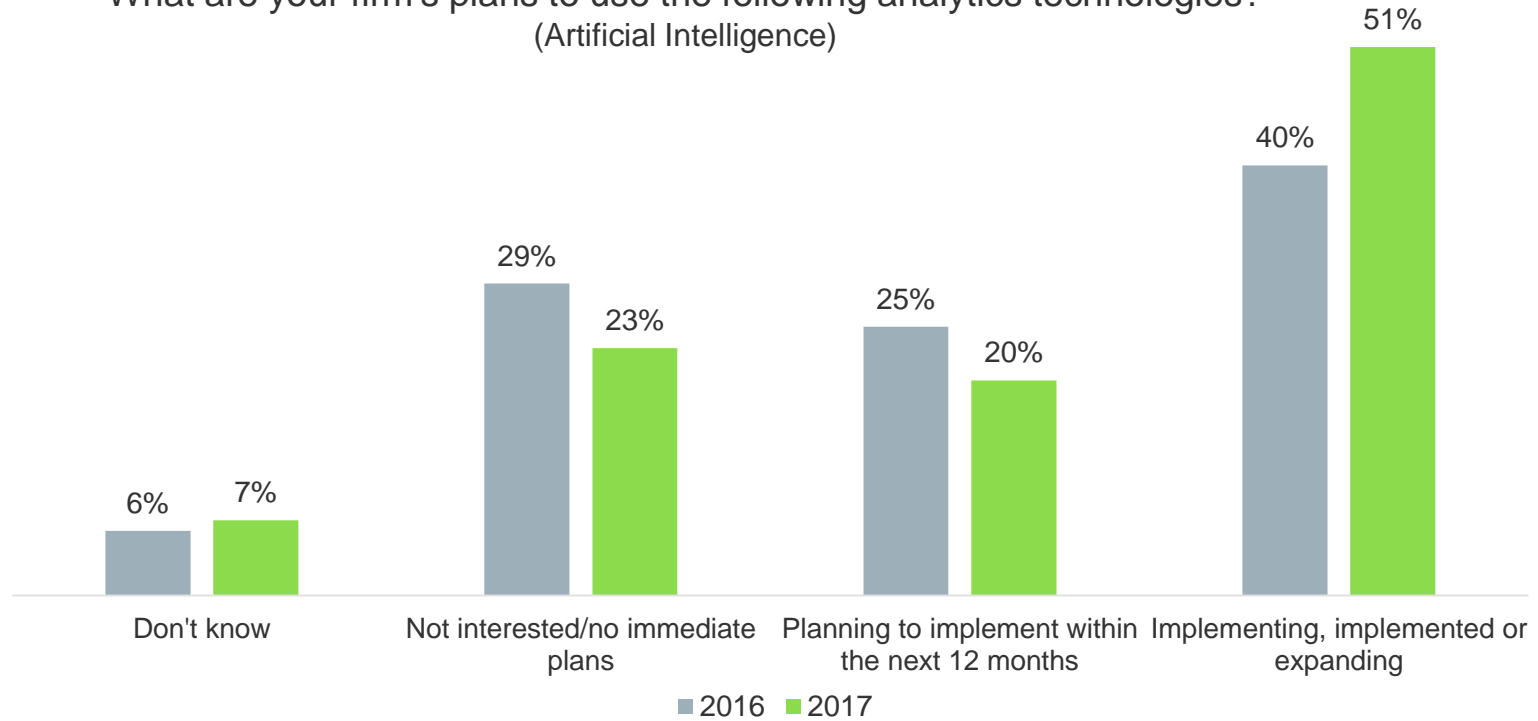


1

**AI tech
advancements
raise the bar for
service.**

An AI adoption tsunami

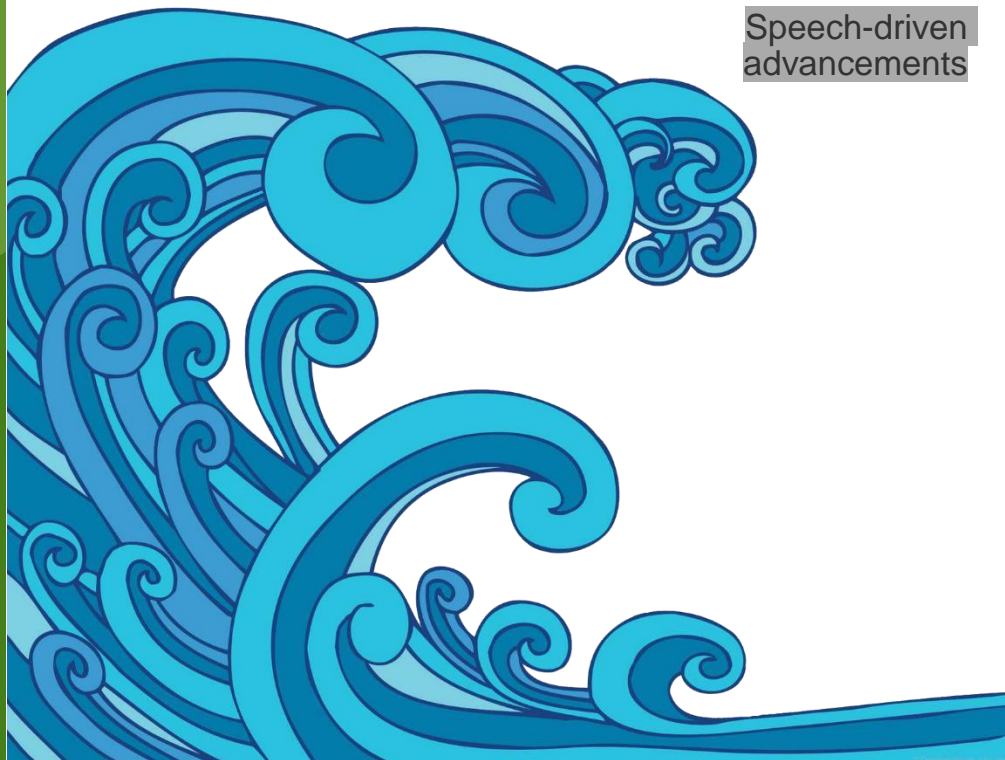
What are your firm's plans to use the following analytics technologies?
(Artificial Intelligence)



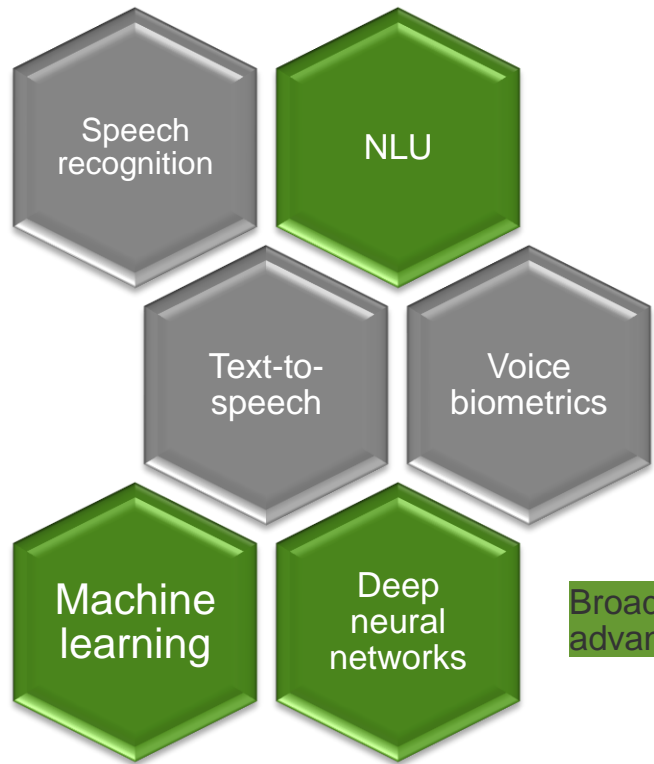
Base: 2094 and 2106* data and analytics decision-makers

Source: Forrester Data Global Business Technographics® Data And Analytics Survey, 2016 and 2017

The tsunami has many components



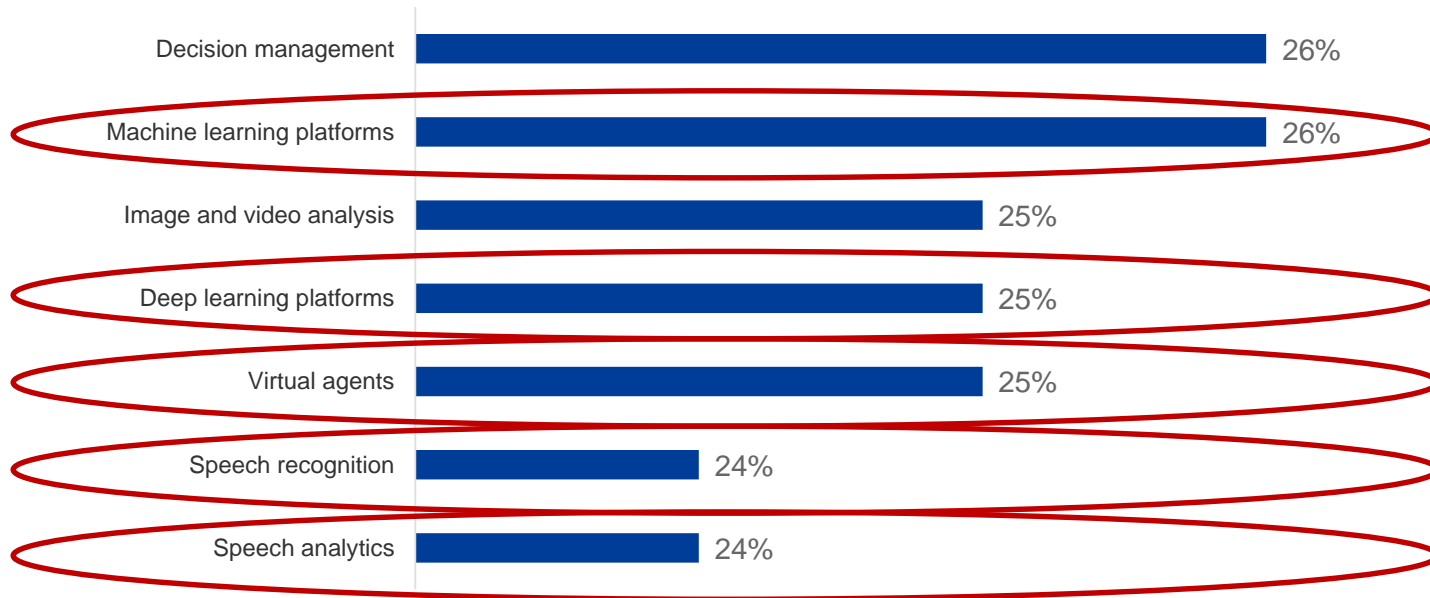
Speech-driven
advancements



Broader AI-driven
advancements

Customer experience-focused tools are critical building blocks

Which of the following building blocks is your firm likely to use or using for AI?
(only top technologies shown)



Note: Not all options shown

Base: 1,476 data and analytics decision-makers at firms using or planning to use AI

Source: Forrester Data Global Business Technographics® Data And Analytics Survey, 2017

AI, for real

1

Use AI for **the right business objectives**

=

25% reduction in online support costs

2

Understand how **customers want to interact**

=

VA/chatbot volume increased by **more than 50%**

3

Differentiate your chatbot – **make it yours**

=

15% reduction in calls to contact center

4

Always **enable a way to continue**

=

Each **\$1 spent = \$24** in incr. lifetime revenue

5

Never stop optimizing

=

75% increase in automation

Recommendations

- › Don't adopt AI for AI's sake, build a compelling business case first.
- › Determine which pieces of AI will actually serve those needs—you don't need to adopt it all at once.
- › Understand how customers want to interact – leverage your data!
- › Never deploy automation in a silo.
- › Build resources for continuous improvement into your plan from Day 1.

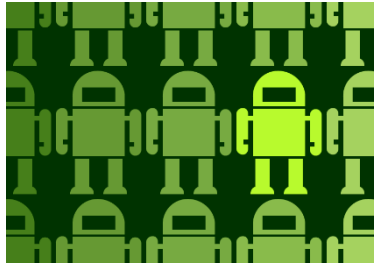


2

**A chatbot
backlash is
coming.**

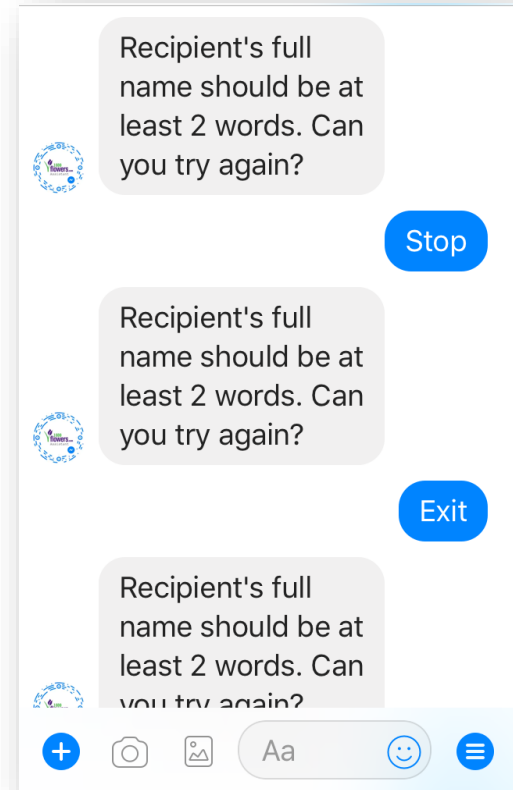
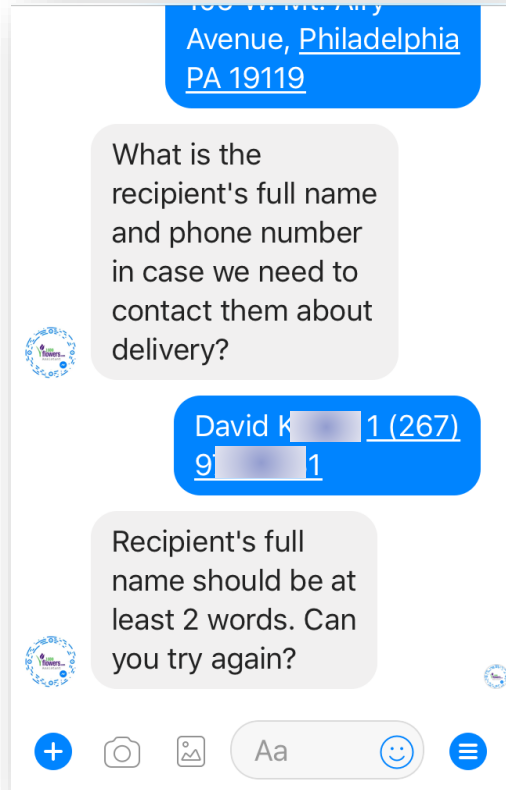
Which of these statements best describes your current approach to chatbots and conversational AI?

- We've implemented a solution, but it isn't really living up to expectations
- Execs are demanding we have a strategy, but we don't know where to start
- We're still working on the business case and/or trying to secure budget
- We're building a solution now, and it'll be ready in the next 6-12 months
- We've defined our strategy, but we haven't built anything yet
- We've implemented a solution that's delivering great results for our business
- Not sure



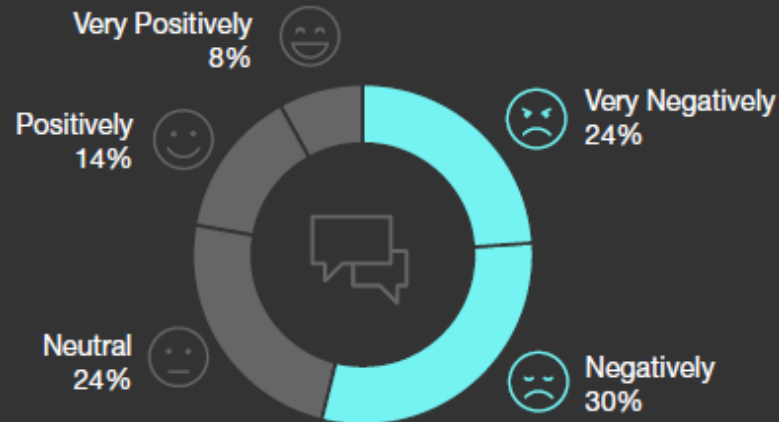
When was the last time you've had a great customer service experience with a chatbot?

Chatbots (even *good* ones) frustrate users



We expect chatbots to disappoint

“Please indicate to what extent you think chatting with a company’s AI customer service agent instead of a real person when you need help will affect your quality of life”



54% of US online consumers expect interactions with customer service chatbots to **negatively affect their quality of life.**³

Source: Forrester Analytics Consumer Energy Index Online Survey, US Consumers 2018

The last time there was widespread dissatisfaction with customer service automation, consumers took matters into their own hands...



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us automotive	back to top	phone	get human customer service
AAA		800-222-4357	Press 0 repeatedly after initial intro.
Allstate Road Service		800-869-7997	Direct to human.
ChevronTexaco		800-243-8766	Press 0 repeatedly.
Chrysler Financial		800-700-0738	Select language, then press 00.
DaimlerChrysler		800-992-1997	After initial intro press 6, then press 2 1 * * at subsequent prompts.
Ford Motor Credit		800-727-7000	Press # repeatedly at each prompt.
GMAC		800-200-4622	Repeatedly press # at each prompt.
Honda Financial Svcs.		800-445-1358	Press 0 at each prompt.
Nissan Credit (NMAC)		800-888-2799	Press 1 0.
Nissan USA		800-647-7261	Press #
Toyota Financial Svcs.		800-874-8822	Select language option, then 00000.
VW USA		800-822-8987	Press 3 after initial intro; press 2 to decline survey.
us credit	back to top	phone	get human customer service
Amazon Visa		888-247-4080	Press 0 0. Ignore invalid account message.
American Express		800-528-4800	Press 0 repeatedly.
American Express Business		800-492-3344	Press 0# at each prompt.
AT&T; Universal Card		800-423-4343	Don't press or say anything.
Bank Card Svcs.		800-655-1491	Press 0 repeatedly.

Screenshot of [gethuman.com](#) from April 24, 2006

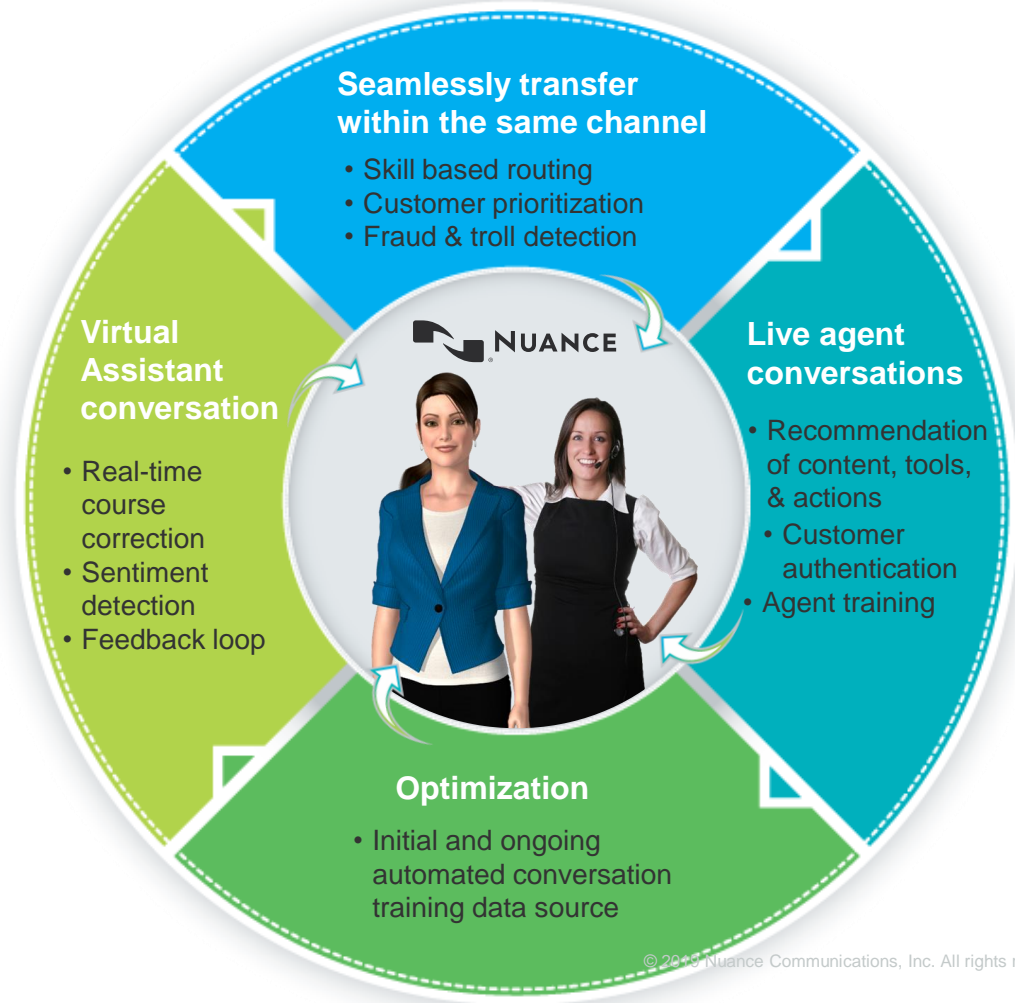
gethuman redux is coming.

BACK
TO THE FUTURE



**Blending humans and
chatbots will be key!**

Leveraging AI in the contact center



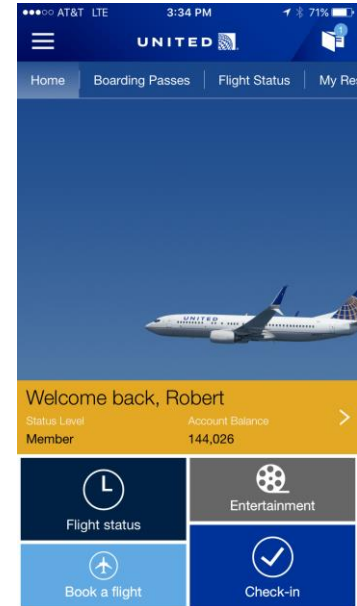
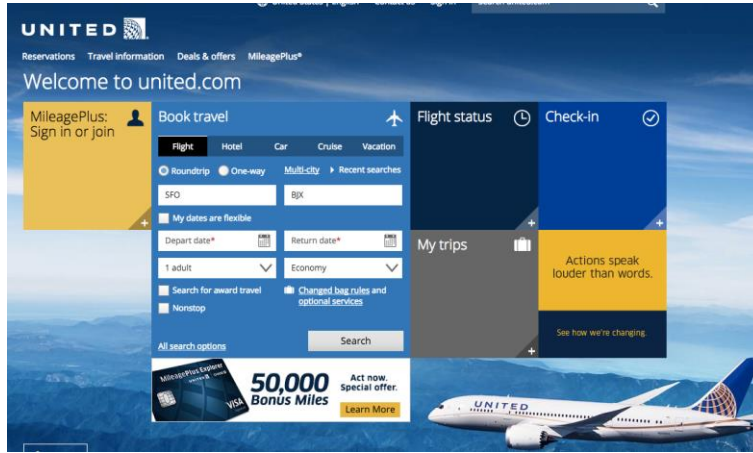
Recommendations

- › Assume that your chatbots will fail regularly.
- › Avoid replicating “IVR hell.”
- › Allow your customers to seamlessly get to a live agent with minimal friction.
- › Pass context from the chatbot to those agents: customer’s intent, what caused the handoff, etc.



3

Computers are finally meeting us on our terms – through human voice.



Globally, there are 500M+ Google Assistant-enabled devices and 500M+ Siri-enabled devices¹



14%

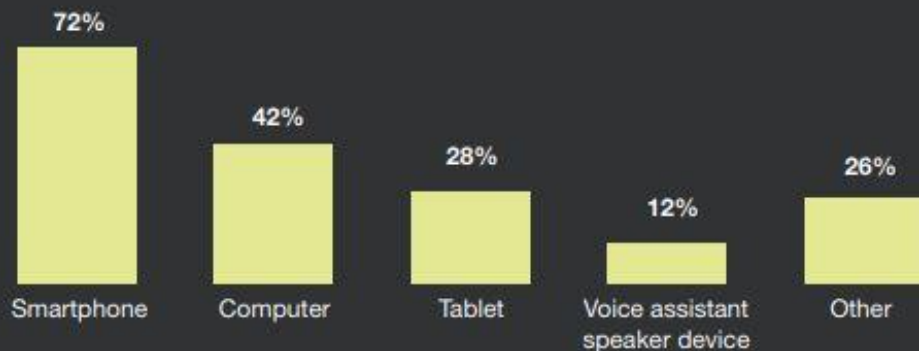
of US online adults
use a voice assistant
speaker device²



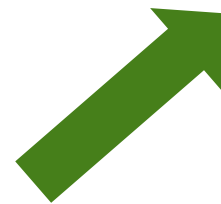
10%

use a voice-activated
digital assistant on a
smartphone weekly²

“On which devices do you use a voice assistant?”³




Adoption for voice assistants (VPAs) is rising and ushering in the age of voice



The number of US households with smart speakers will grow at a CAGR of 34% between 2017 and 2022

21% in 2018 -> 50% in 2022

A man with a beard, wearing a dark blue long-sleeved shirt, is sitting at a wooden table. He has his hands clasped together and is looking towards the camera. In the foreground, on the table, is a black Amazon Echo smart speaker. The background is a blurred indoor setting with a plant and a window.

4 out of 5 adults in
the U.S. have
engaged with an
Alexa device

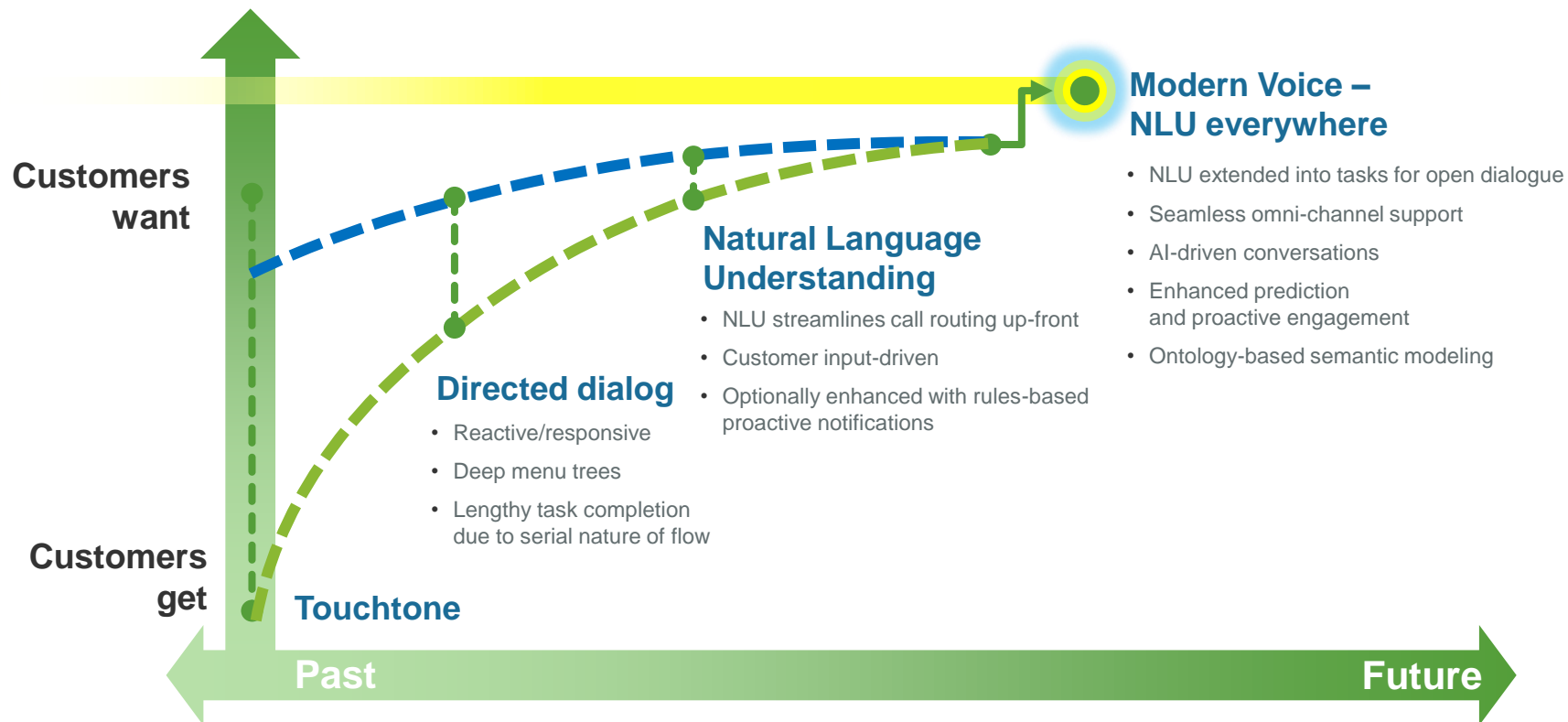
Amazon, 2018



More than 100
million Alexa-
powered devices

Amazon, 2019

The evolution of voice engagement



The Modern Voice experience

Intuitive



Understands what was said, by whom, and what it means

Conversational



Engages the user in an intelligent conversation to accomplish the task

Personalized



Tailors the interaction based on what is known about the user

Predictive



Predicts why a customer calls and offers proactive assistance, providing information and enabling action

Consistent



Creates a seamless experience across channels and time

Recommendations

- › Digital hasn't killed voice; it's made it more important than ever.
- › Not all voice bots are created equal—if you're building enterprise-grade apps, use enterprise-grade speech.
- › Understand the difference between telephony/IVR speech and device-based voice. Your customers do not use them in the same way.
- › Voice provides the ideal environment for personalization, so plan for integrations into other systems to provide the required data.



4

**Fraudsters become
more sophisticated
in targeting
contact centers.**

Security and CX co-exist, but not always easily

- Consumers want friction-free experiences
- Security often *demands* intentionally inserting friction into processes
- Striking the balance between these demands will take a lot of planning, creative thinking, design, and education



The mandate: Seamless authentication and fraud prevention

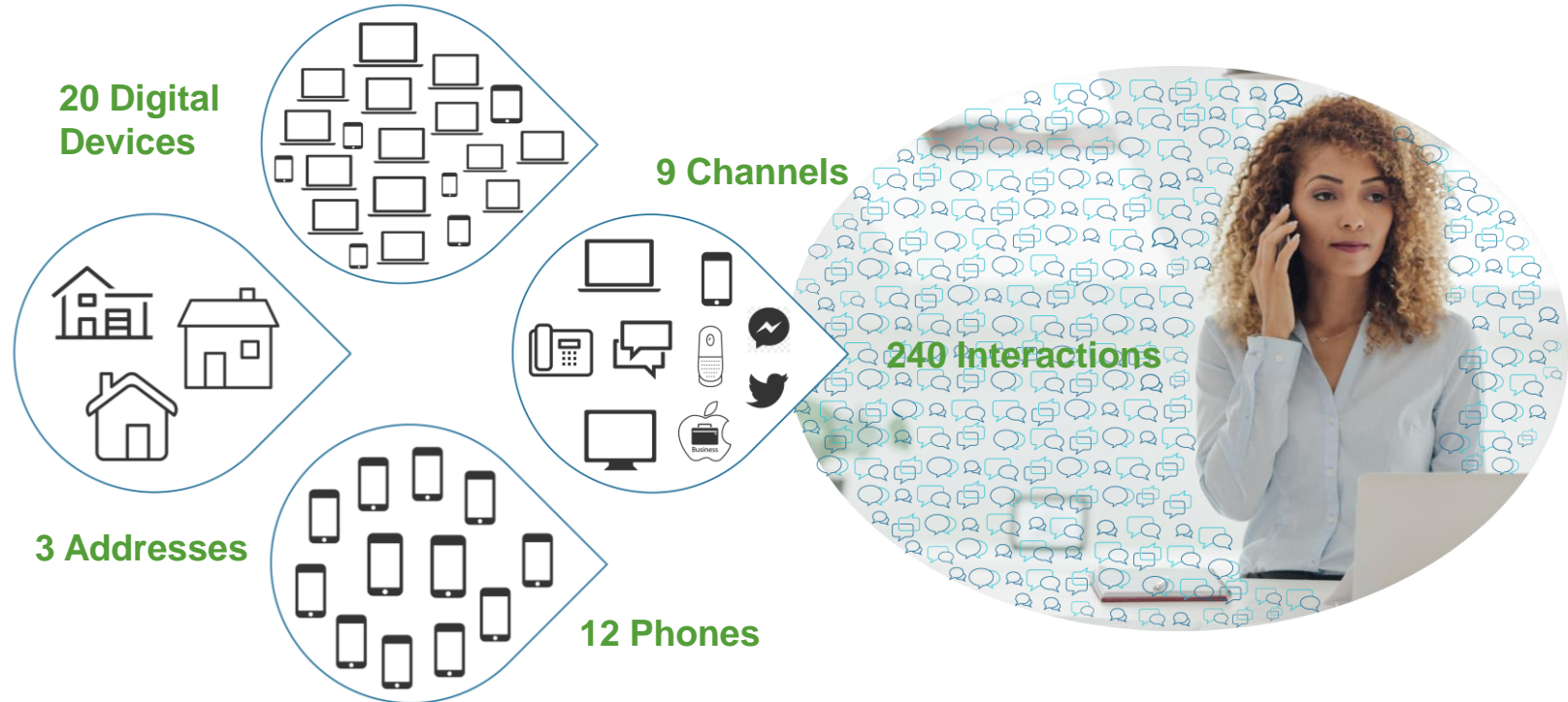


Jennifer Smith
Seamless
authentication



Mark Henderson
Behind bars for
attempted fraud

Customers stay constant across time – But channels, locations, devices will not



Nuance delivers

99%

**authentication
success rate**



Industry leading
**biometric
authentication**

90%

**detection of fraud
attempts**



Industry leading
fraud prevention

85%

**automation of manual
authentication
processes**



Industry leading
operational savings

Recommendations

- › Make biometric-based authentication AND biometric-based fraud prevention an integral part of your fraud prevention strategy.
- › Don't leave a back door open to fraudsters—protect all customer care channels with biometrics.
- › Design a biometric approach to fraud prevention which allows you to identify a fraudster across time, no matter what device they use, where they are located, or what channel they use.
- › The best fraud prevention approach includes both people and technology!



5

**DIY and API-driven
approaches are
hot right now.**



Let's unpack that approach, however...

Clear pluses

- Agility
- Speed
- Lack of ongoing vendor involvement
- Potential to use one technology stack for multiple uses
- Lower costs—at least upfront, anyway

Less clear...

- Resources
 - › Do you want to fight the talent wars for AI experts?
 - › Do you have designers? Do you want to in the long term?
 - › Do you have folks who understand the art of dialogue? Do you want to hire screenwriters?
- Continuous improvement
 - › Ongoing maintenance of AI requires hands-on commitments. Ready for that?

Voice command vs. Conversational Dialog



What's the weather today in Boston?

It is 75 degrees and sunny today with a chance of a thunderstorm this afternoon.

Great!



AMC Theaters. Welcome back Dan! How can I help you today?

What time is Civil War playing at AMC Mercado?

The next showing of Captain America Civil War at AMC Mercado, in San Jose, California, is at 8:10pm.

Are there other shows after that?

There are two additional showings today, at 10:10pm and 11:30pm. Do you want me to look for show times at nearby AMC Theaters?

No, but I'd like to buy 4 tickets for the 10:10 show.

You'd like 4 adult tickets?

Yup

All set! I've booked 4 adult tickets for the 10:10 showing of Captain America Civil War at AMC Mercado. Tickets will be held for pickup at the theater. You now have a balance of 12,400 AMC Stub Reward Points. Enjoy the movie!



15%

Bot
Basic

NLU
Prebuilt Data

TTS
Prebuilt
Prompts

Ontology
Intents,
Concepts

ASR
Prebuilt Data

A lot of people
can do this but it is only
15% of the effort

Nuance delivers the full 100%

15%

Bot
Basic

NLU
Prebuilt Data

TTS
Prebuilt Prompts

Ontology
Intents,
Concepts

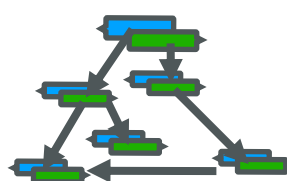
ASR
Prebuilt Data

the other
85%
of Effort

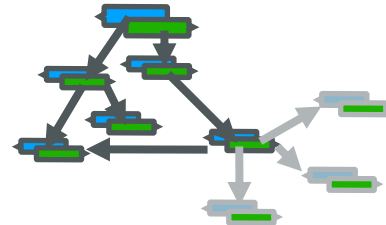


True Enterprise Grade

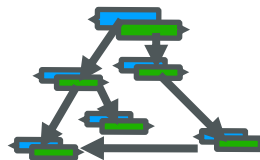
Dialog Management



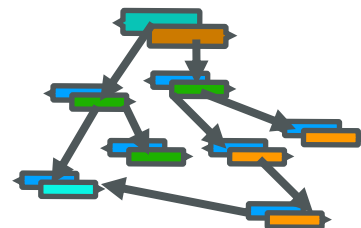
Optimization at Scale



Testing



Customization



Recommendations

- › Ask yourself these critical questions to determine if you “have what it takes”:
 - Do you have designers who understand the art of dialogue?
 - Do you have the ability to continuously improve? Deliver ongoing maintenance?
- › Avoid stranded investments and siloed applications.
- › Partner with a vendor that will work with you over time to not only create the customer engagement experience but to continuously optimize it after initial deployment.
- › Remember the expression “you get what you pay for” is an expression for a reason!

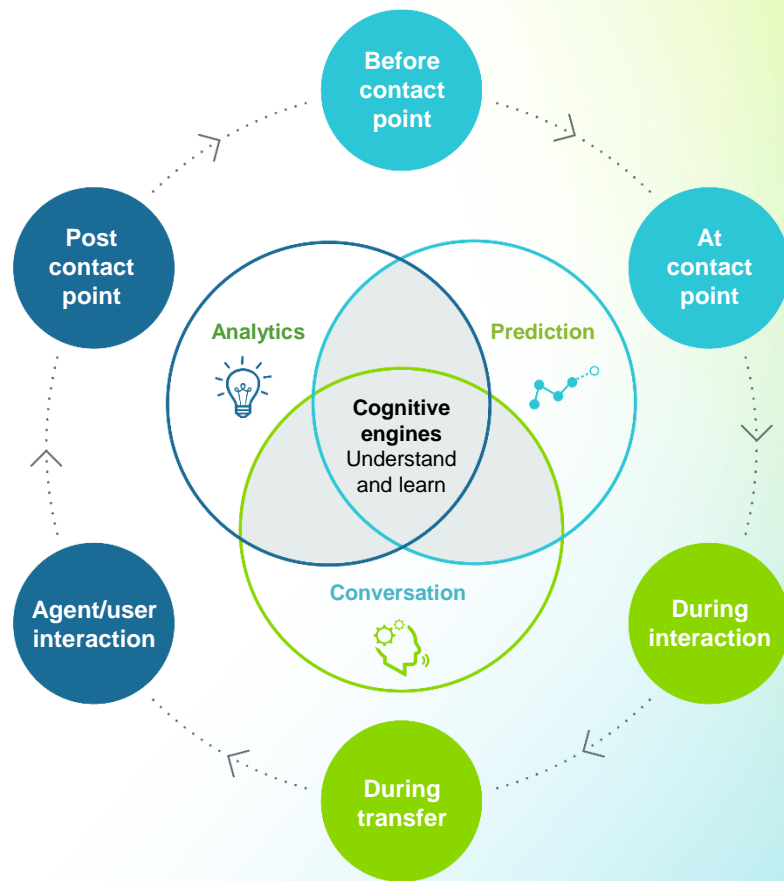
About Nuance

The Nuance difference

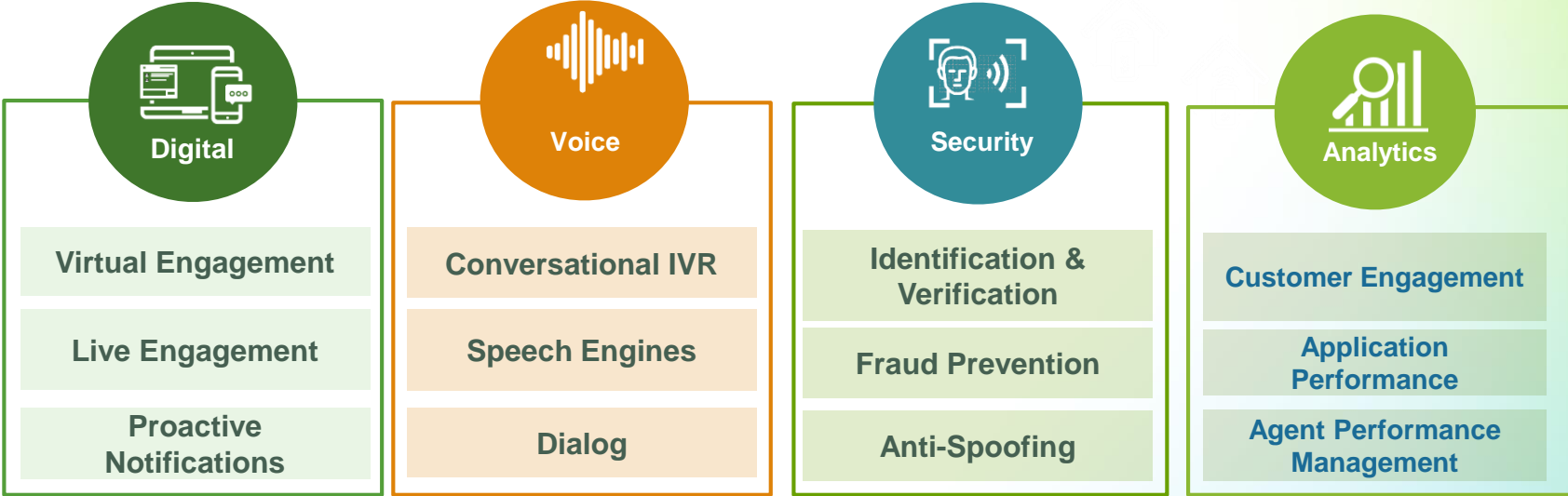
AI-powered omni-channel customer engagement

Prediction Conversation Analytics

These, backed by cognitive engines and human assistance enable **easy, effortless** outcomes throughout the customer lifecycle.





Rich **intelligent** engagement product portfolio




Powering major brands


It's rare to go a day without using Nuance products and technologies

Telecommunications 



at&t
COMCAST
Telefonica
Telstra
BT
Time Warner Cable
vodafone

Financial Services 





citi
E*TRADE
USAA
Bank of America
BARCLAYS
Deutsche Bank

Healthcare 



EXPRESS SCRIPTS
Humana
SHARP
aetna
UnitedHealthcare
Cigna
HCSC

Travel 



American Airlines
AIRFRANCE
AMTRAK
DELTA
Southwest

Government 



Australian Government
IRS
Department of Veterans Affairs
NHS

Utilities & Retail 



DUKE ENERGY
Coca-Cola
CVS
Exelon
FedEx
PSE&G
Domino's Pizza
ticketmaster

Delivering tangible results ...

Across all major industries

\$16 million

Increase in revenue with live chat for a **travel & hospitality** company

11K

Live agent **calls eliminated** per day with IVR for a **multinational courier delivery** company

\$24 million

Cost savings for a **global bank** with Nuance Security Suite over **three years**

191%

Proven **ROI** with voice biometrics for a **global bank**

\$25 million

In **annual** cost savings with conversational IVR for a **wireless service** company

\$6.6 million

Additional **revenue per year** with chat-assisted orders for an **insurance** company

10 month

Payback period with voice and behavioral biometrics for a **global bank**

> \$1 million

Call deflection **savings** with live chat in 90 days for an **insurance** company

\$3 million

In **savings per year** with conversational IVR for an **airline** company

\$19.2 million

In **net benefit per year** with proactive notifications for a **leading cable provider**

\$1.6 million

Yearly savings with conversational IVR for a **multinational courier delivery** company

\$1M +

In annual **savings** with voice biometrics for a **European bank**



FORRESTER®

Ian Jacobs
Principal Analyst
Forrester Research



 **NUANCE**

Marina Kalika
Senior Director, Marketing
Nuance Communications

Q & A

Webinar

Customer Engagement 2019: Trends, Predictions & Priorities

Thank you!

Reach out for more information:
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