REVOLUTIONIZING SERVICE JOURNEYS WITH AI

Erin Wright – Co Founder | Managing Partner

Service journeys, the blueprints of how organizations provide their services, are undergoing a transformation. With AI, businesses across industries are able to refine their processes to drive towards maximum efficiency and superior customer experience.

This article will dive into how organizations can leverage AI for generating and analyzing customer and employee experiences through the backdrop of a comprehensive example case study.

Service Journeys Explained

A service journey provides a holistic view of all the processes and interactions involved in delivering a service. It captures both the visible customer interactions and the behind-the-scenes processes.

For example, a hotel and hospitality organization could consider the process a customer might go through on a vacation. A typical hospitality service journey captures stages like exploring accommodations, booking a room, checking in, enjoying hotel amenities, and providing post-stay feedback. Along this journey, critical data like booking preferences, amenity usage, feedback trends, operational processes, and interactions between staff and guests offer hotels an in-depth perspective on the complete guest experience.

When optimizing these paths, mapping the current state should be the first step to set a foundation.. By establishing a clear baseline of existing operations, organizations can gain an in-depth understanding of their current strengths and weaknesses. This is essential to ensure that any subsequent improvements or innovations are rooted in reality, making them more relevant and effective.

Incorporating AI in the Service Journey

Historically, creating the service journey relied heavily on manual observations and feedback. AI enhances the service journey by cross-referencing documented processes with real-world data, detecting discrepancies, or running data through models that lean on Natural Language Processing (NLP)to interpret customer feedback across various channels, and identify common issues.

After defining the service journey, a deep analysis highlights its effectiveness and pinpoints challenges. Traditional methods, such as interviews and benchmarking, provide valuable insights but have limitations in processing vast data and avoiding bias. AI complements this by predicting outcomes, identifying customer behavior trends, and benchmarking against competitors using available data. A combination of AI and human understanding can ensure a comprehensive analysis of the service journey.

Business Corp's Service Journey

Let's further explore our discussion by diving into the fictional Business Corp. as they explore the benefits that emerge from melding AI with traditional service journey mapping and analysis.

Background:

Business Corp., a B2B global software provider, recognized areas for improvement based on customer feedback and a dropping conversion rate in their sales pipeline. Determined to solidify their industry position, Business Corp. aimed to assess and potentially revolutionize their service journey using both human expertise and AI.

Generating the Service Journey

The Business Corp. team, equipped with their firsthand knowledge and experience, sketched the initial service journey. They covered every touchpoint, from the first client contact to post-sales support. To do this, the team tapped into various activities to ensure comprehensive coverage:

Stakeholder Interviews: Engaging key personnel from sales, operations, logistics, and customer service, they conducted in-depth interviews to capture firsthand knowledge of every phase in the sales cycle.

Customer Interviews: Interviews with a diverse set of their customers gave them insights into expectations, pain points, and preferences, enabling them to map touchpoints from both the seller's and buyer's perspectives. Business Corp. ensured that they were having discussions with customers who had positive, negative, and neutral experiences, ensuring a balanced perspective of their service journey.

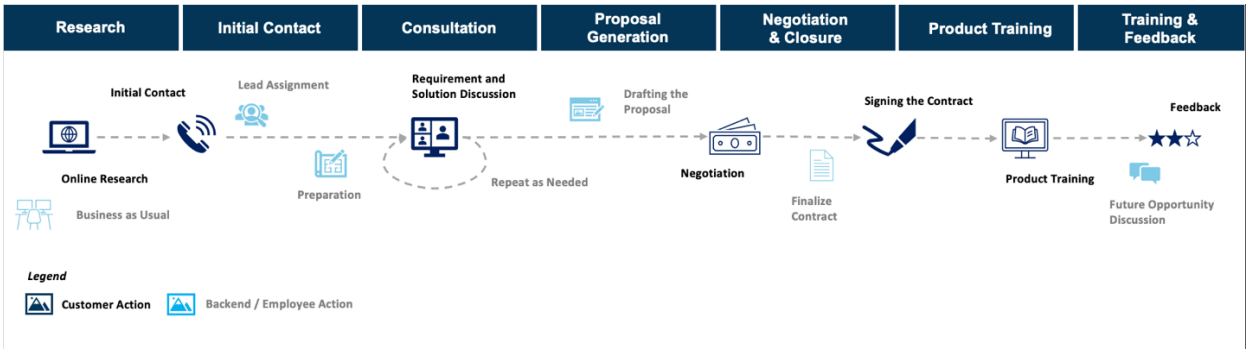
Process Documentation Review: Examining existing sales process documents, order fulfillment guidelines, and post-sales support protocols, the team was able to chart the official, by-the-book journey.

Observational Studies: Direct observation of sales meetings, order processing, and post-sales interactions revealed any discrepancies between the documented processes and actual practices.

Feedback Analysis: They analyzed the feedback collected over the last N months, focusing on patterns and recurrent issues faced by clients, which added another layer of depth to the journey.

AI-Enhanced Generation: The AI tool parsed through sales quotes, assessing the alignment between proposed solutions and client needs, scrutinized the negotiation and sales closing processes, and analyzed email communications, CRM activities, and client engagement metrics to add a data-driven layer to the human-crafted journey.

Business Corp.’s identified key stages in their sales process, from a customer’s initial research about their software and services through consultations, negotiations, training, and ultimately, product feedback. The team has mapped out a comprehensive view of their sales experience by identifying both primary actions taken by customers and corresponding or supporting processes by employees.

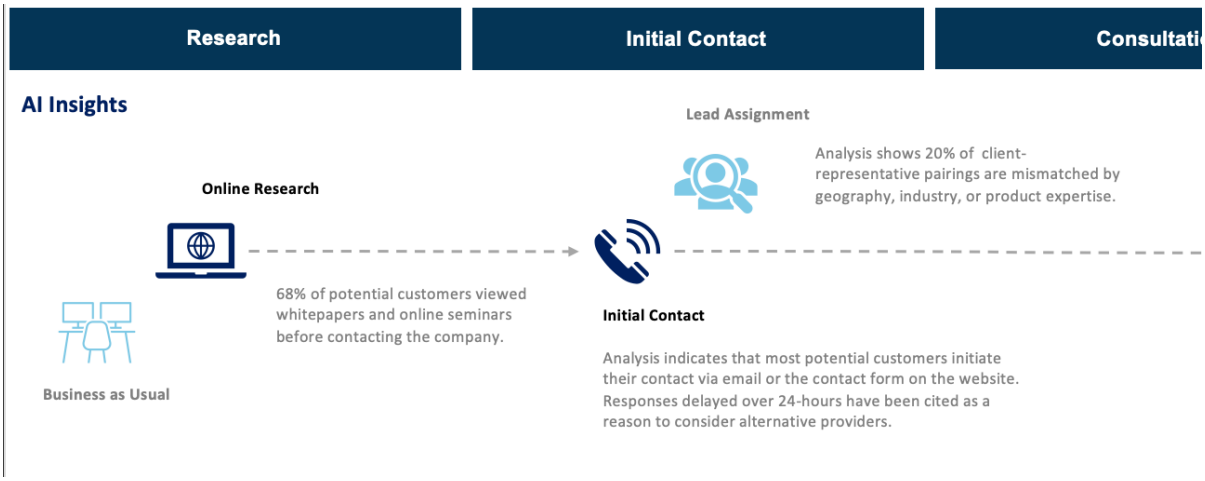


Examining the initial two stages of the journey, the Business Corp. team set out to understand the details, thoughts, and emotions at each stage. We’ll focus here on the first two phases: customer research and the initial contact.

The diagram below illustrates the breakdown of customer actions such as competitor comparison and testimonial review, showcasing the areas customers are interested in exploring for informed decision-making. It also identifies the backend processes undertaken by employees, like preparing relevant marketing materials, to ensure they are responsive to customer needs.

Enhancing the journey mapping with AI insights, the diagram below illustrates examples of the real-time, data driven insights that AI can provide. For example, during the research phase, AI insights reveal that 68% of potential customers engage with whitepapers and online webinars before contacting Business Corp., guiding the team to prioritize and optimize these resources. Similarly, AI insights assist in identifying potential mismatches in client-representative pairings,

ensuring that customers interact with representatives who are most aligned with their specific needs and industries.



Analyzing the Service Journey

Armed with a comprehensive current state service journey, Business Corp. shifted into analytical mode. With the combined insights of client feedback, direct observations, and data from their AI tools, a more nuanced picture of their service journey emerged.

Traditional Analysis:

Client Feedback: Direct feedback from clients was the guiding light. It helped uncover pressing issues such as delayed response times and flagged more nuanced challenges like certain ambiguous sections within sales presentations.

Employee Feedback: Feedback from employees on the ground, who were directly executing these processes, brought to light additional steps or modifications that weren't formally documented. This feedback was especially invaluable as it provided insights from the frontline – areas where employees had improvised or adjusted to cater to client needs or to overcome operational hitches.

Process Gaps: Comparing observational data with documented processes highlighted inconsistencies. This was pivotal in identifying touchpoints that didn't align with the company's intended service journey.

Industry Standards: To ensure Business Corp. was aligning with industry standards, the team actively compared their processes against recognized best practices in the B2B service domain.

AI-Driven Analysis:

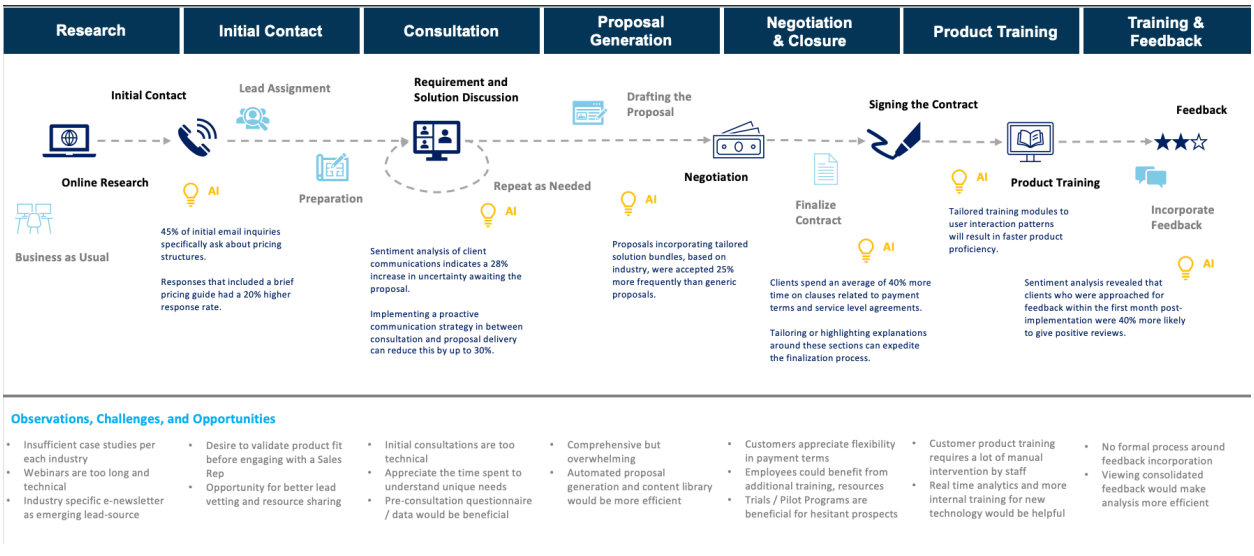
Proposal Analysis: The AI tool broke down sales quotes to gauge alignment between proposed solutions and actual client needs. By studying historical data, the system could pinpoint which propositions typically sealed the deal and which ones fell flat.

Engagement Metrics Evaluation: The AI analyzed various metrics like email open rates, time spent on sales presentations, and interactions within the CRM. This provided insights on the stages where clients were most engaged and where they seemed to disengage.

Sales Closure Pattern Detection: By scrutinizing the negotiation and sales closing processes, the AI could highlight certain patterns or terms linked to successful closures. This was invaluable in refining the sales strategy for higher conversion rates.

Webinar Content and Behavioral Analysis: By employing Natural Language Processing (NLP) and content analysis algorithms, AI delved into the nuances of Business Corp.'s webinars. The system evaluated the efficacy of product content, pinpointing areas that resonated most with clients and those that led to confusion or were commonly overlooked. Venturing further, AI evaluated video recordings to discern audience engagement levels. It highlighted moments of peak interest and potential zones of disconnection.

Upon concluding the analysis of their service journey, Business Corp. now has a detailed understanding of their service journey and customer interactions, revealing key insights, challenges, and future opportunities.



Outcomes and Next Steps:

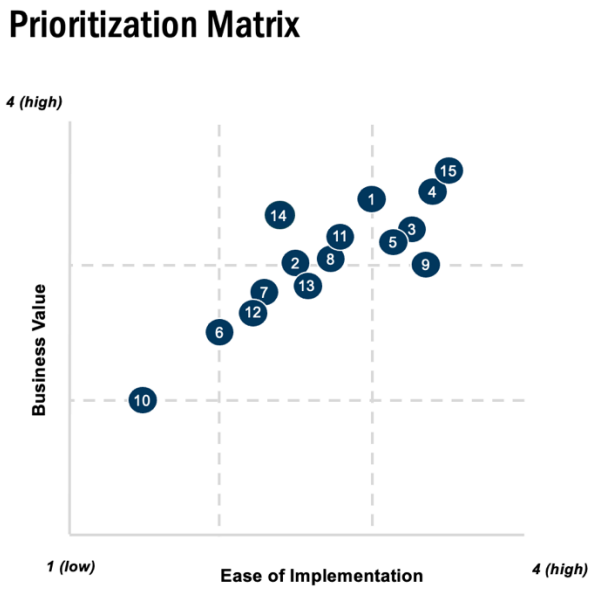
Traditionally, organizations like Business Corp. relied on subjective evaluations and the gut instincts of senior executives to prioritize service journey improvements. These assessments, while grounded in experience, often lacked the objectivity that data-driven evaluations offer. If data driven business intelligence was used, there was a tendency to expect it to be resource heavy, costly, and typically required 3rd party consultant engagement that didn't necessarily that the industry alignment that Business Corp. might need. This could lead to potential biases, overlooked opportunities, or misaligned investments.

Upon completion of the analysis, Business Corp. was presented with many opportunities for service journey optimization. Recognizing the pitfalls of solely relying on the traditional methods, the team turned to AI for a more unbiased approach.

Using a combination of predictive analytics, historical data, and real-time feedback, the AI system assigned scores to each identified opportunity based on two primary factors: potential business impact and ease of implementation.

Opportunities that were projected to significantly enhance customer retention or boost sales conversions, and which could be rolled out with minimal adjustments to existing technology or processes, received high scores. Those demanding substantial operational overhauls but offering limited returns were ranked lower.

Utilizing this scoring matrix, again the blended approach of AI and the executive understanding of the organization and business, provided the Business Corp. team with a roadmap that enabled them to strategically prioritize their efforts for maximum return on investment.



ID	Category	Opportunity	EOI	Business Value
1	Research	AI-driven Product Recommender	3.0	3.5
2	Research	AI-enhanced Industry e-Newsletter	2.5	3.0
3	Initial Contact	Enhanced AI Pricing Inquiry Response	3.2	3.3
4	Initial Contact	AI-driven Lead Assignment	3.4	3.6
5	Consultation	Pre-consultation AI Questionnaire	3.1	3.2
6	Consultation	Proactive Communication Strategy	2.0	2.5
7	Consultation	Enhanced Technical Support during Consultations	2.3	2.8
8	Proposal Generation	AI-driven Custom Proposal Generator	2.7	3.1
9	Proposal Generation	Automated Proposal Content Library	3.3	3.0
10	Negotiation & Closure	Smart Contract Finalization	1.5	2.0
11	Negotiation & Closure	AI Contract Highlighting	2.8	3.2
12	Product Training	AI-Adapted Training Modules	2.2	2.7
13	Product Training	AI Support during Training	2.6	2.9
14	Feedback & Follow-Up	Real-time Feedback Integration	2.4	3.4
15	Feedback & Follow-Up	AI-driven Feedback Analysis	3.5	3.7

For instance, the in-depth analysis unveiled the Product Recommender as a pivotal tool for Business Corp. (Opportunity 1) to implement. Traditional beliefs held that customer choices were primarily influenced by sales teams' recommendations because of the personal touch and understanding of the individual in guiding customers to products that best meet their needs and preferences.

However, with the AI insights, the team revealed that the Product Recommender as a powerful tool that could enhance customer decision-making and increase lead generation. The Recommender can operate intelligently, analyzing publicly available customer information, prior interactions, and customer preferences gathered through file upload, free text descriptions, or a wizard, to deliver recommendations during the online research phase. This approach allows customers to gain confidence in product alignment with their needs before progressing further in the sales journey. When customers eventually connect with the team, they don't start from scratch; the prior insights enable Business Corp.'s team to offer refined and accurate solution recommendations, ensuring a more efficient and tailored customer experience.

Once Business Corp. has created a robust strategy and assessed the value and cost of their opportunities for optimization, the initiatives would be sequenced for implementation. These would be informed by factors such as initiative priority and business value, technical dependencies, cost, and effort, timing considerations, and functional groupings. This approach ensures an implementation that aligns with organizational goals and expedited delivery.

Parting Thoughts

The combination of human insight and AI is redefining service journeys, providing businesses with deeper insights. As the leader of our functional team at ODNOS, this excites me because we are now collaborating with our clients and partners to unearth previously hidden trends, harness untapped data sources, further streamline processes, and enhance both customer and employee satisfaction a new and unique way.

If this resonates with you, let's talk further over a virtual (or real-life) coffee!

Erin Wright is Managing Partner and Co-Founder of ODNOS Consulting. She is a Functional Architect, Technologist, Strategist, and Designer. The influence of her work has been seen in Fortune 500 companies and small non-profits that have big impact in our world. She has designed operational systems that challenge the traditional approach to technology by putting people at the center of solutions and creating strategies for businesses to enhance the Human Experience.