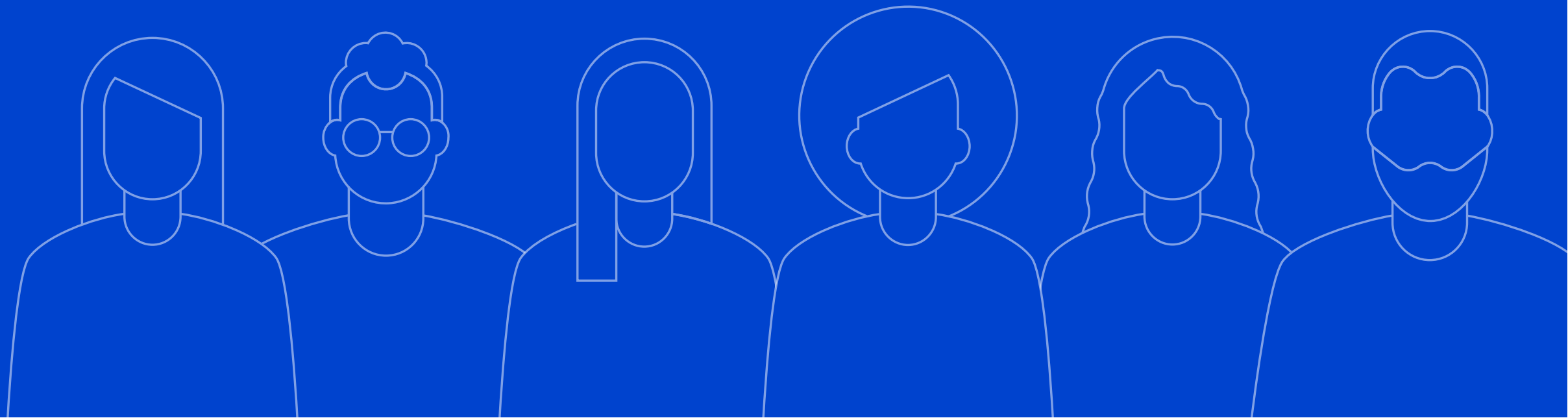


# Automate this, *not that*

Six basic automation  
projects to help you build  
more reliable, fulfilling  
customer experiences



# Why automation?

Predicting which customer behaviors will persist post-pandemic—from wildly fluctuating demand to heightened health and safety precautions—can be tricky. But one area you can control is how you manage the experiences you create for your customers.

Automation, especially automation combined with AI, can help you fix or refine these experiences, resulting in higher sales, better use of resources and greater customer satisfaction.

# 75%

of respondents point to customer experience as the area where their digital initiatives deliver the greatest value<sup>1</sup>

---

1 “Automation and the future of work: Creating intelligent workflows across the enterprise.” IBM Institute for Business Value, July 2020.  
<https://www.ibm.com/downloads/cas/O17AWNv6>

# Six automation projects for better customer experiences

IBM recommends these six automation projects because they're:

- Able to be implemented quickly with impact
- Cost-effective when using cloud software solutions
- Applicable to virtually every business
- Likely to create persistent value going forward
- Able to interact with and build on each other to multiply positive effects



# Automate this ...

## 1. Refund request approvals

### Issue

Meet Claire. She's known for her speed and efficiency, but lately she struggles to keep up with customer refund requests due to a spike in requests and reliance on a largely manual process. She's concerned that customers must wait too long for a decision or that inaccurate service fees are repeated on the next bill. This results in multiple emails or calls for the same customer issue, which further increases backlog.

### Action

Using decision services and workflow management, eliminate manual approvals that delay response times, lead to inconsistencies and are expensive to scale.

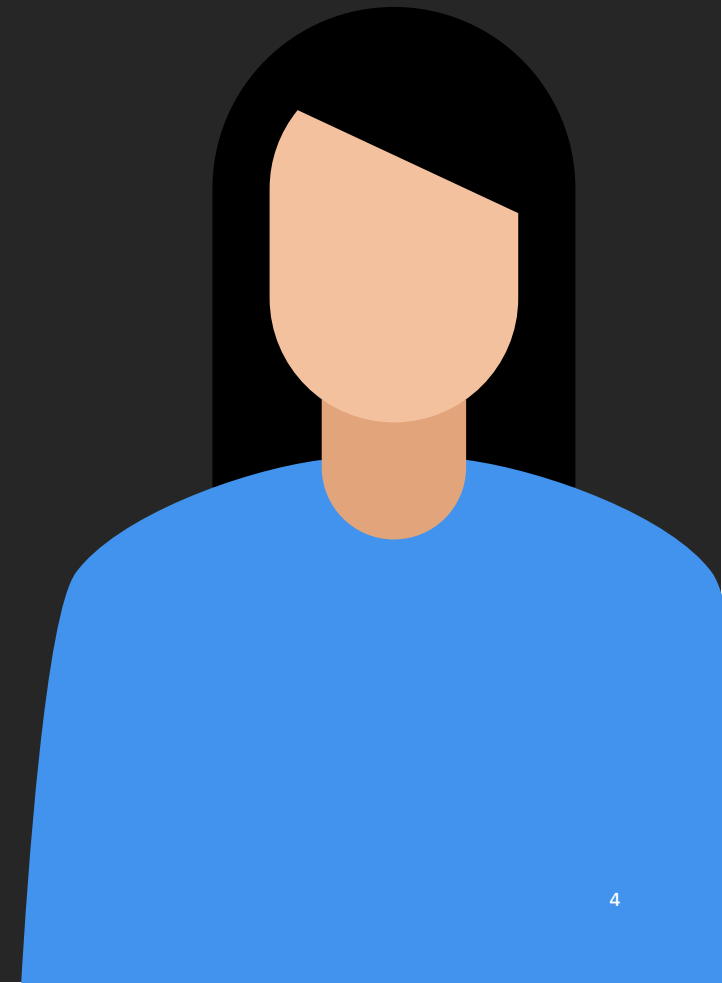
### Automate this

What a refund approval looks like when automated:

- Customer refund request is routed to a decision service
- Decision service determines approval by considering multiple inputs, such as customer propensity to churn, profitability and transaction history, and ensures the automated decision is as reliable as one made by human experts
- System issues refund using workflow capability, notifies customer and updates backend systems; manual intervention only needed for exceptions

### Don't automate that

Avoid automating a personal apology when a human, personal touch is warranted.



# Automate this ...

## 2. Customer request routing

### Issue

Meet Jose. He manually reviews and routes incoming customer emails for his bank and frequently learns something new about his customers in the process. He wishes he had more time to identify opportunities to better serve customers with relevant product and service offers, but he spends most of his time routing an increasing volume of emails.

### Action

Streamline how you process incoming communications using intelligent automation.

### Automate this

What customer request routing looks like when automated:

- AI classifies communications and extracts data
- Decision service determines handling priority based on multiple factors, such as loyalty and profitability
- New case is created to process customer request using workflow capability, then the case is automatically populated with extracted data

### Don't automate that

Avoid automating actions or responses that appear to feel your customers' pain—leave sympathy and empathy to humans.



# Automate this ...

## 3. Customer information updates

### Issue

Meet Erin. She enjoys her colleagues and job, but she'd prefer to spend less time manually transferring customer data into multiple backend systems. As diligent as she is, she's concerned about making errors and knows she could be more effective if she spent her time differently.

### Action

Build robotic process automation (RPA) bots that can read and update customer data.

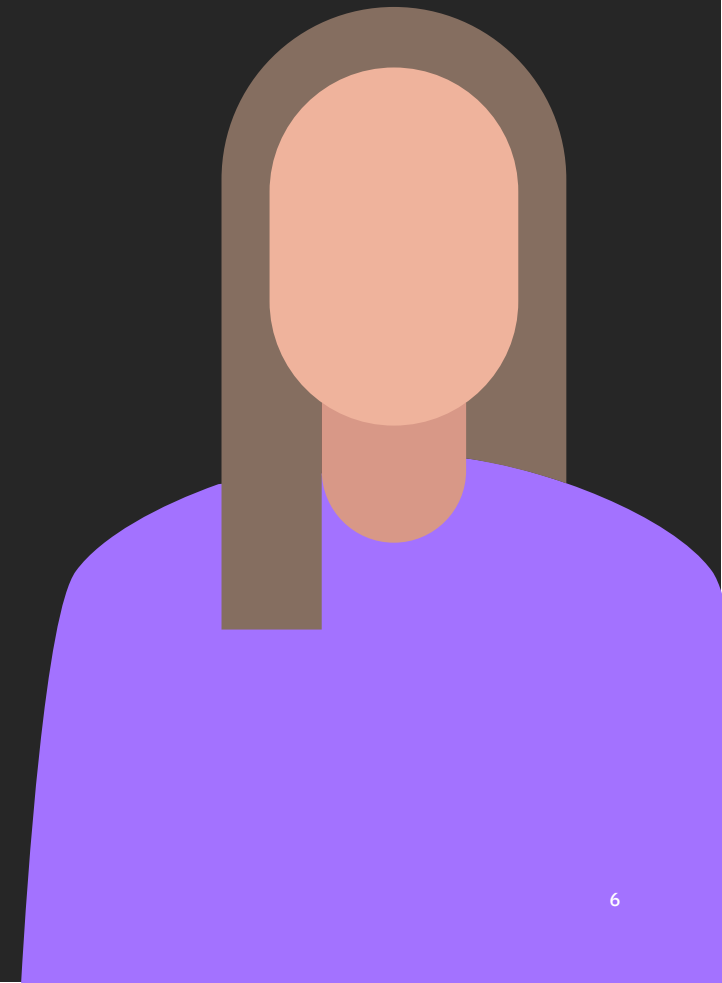
### Automate this

What a customer information update looks like when automated:

- Customer submits new address online, which is picked up by a bot
- New address is validated and bot updates existing systems
- If address is invalid, customer is contacted for resolution

### Don't automate that

Avoid automating any tasks or processes that a trained employee could do quicker than your customer.



# Automate this ...

## 4. Remote data upload

### Issue

Meet Toyin. She regularly speaks to customers to ensure their personal and other relevant information is accurate. She believes these back-and-forth verification conversations could be easily automated for better self-service and time savings.

### Action

Enable customers to quickly and reliably upload information from anywhere using intelligent mobile capture.

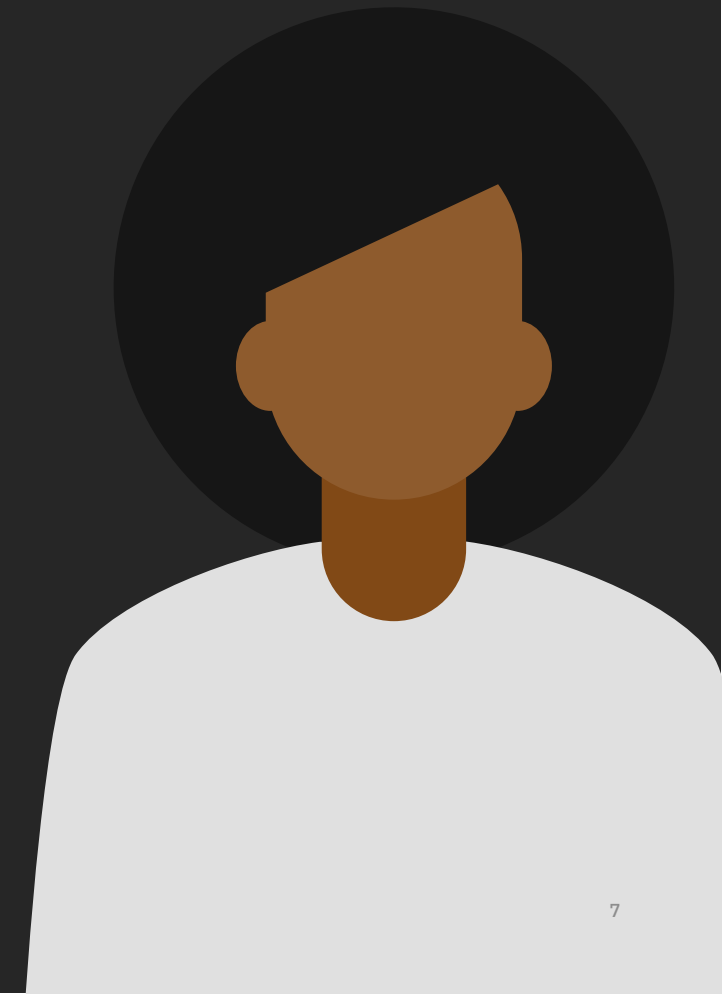
### Automate this

What remote data uploads look like when automated:

- Customers capture documents using their mobile devices
- AI-based mobile capture extracts information from relevant documents, such as names or policy numbers
- Extracted data is automatically validated; customers can verify before data is uploaded to system

### Don't automate that

Avoid automating any action that would be annoying if a person did it—and would be just as annoying when automated—such as sending multiple irrelevant texts or emails.



# Automate this ...

## 5. Compliance verification in retail sales

### Issue

Meet Priya. She supports the online sale of regulated products. Because her company relies on manual oversight to ensure compliance, she can't always get the right answer to customers the first time. It's also difficult to scale this oversight when volume increases.

### Action

Automate online purchase validation in real time using decision services.

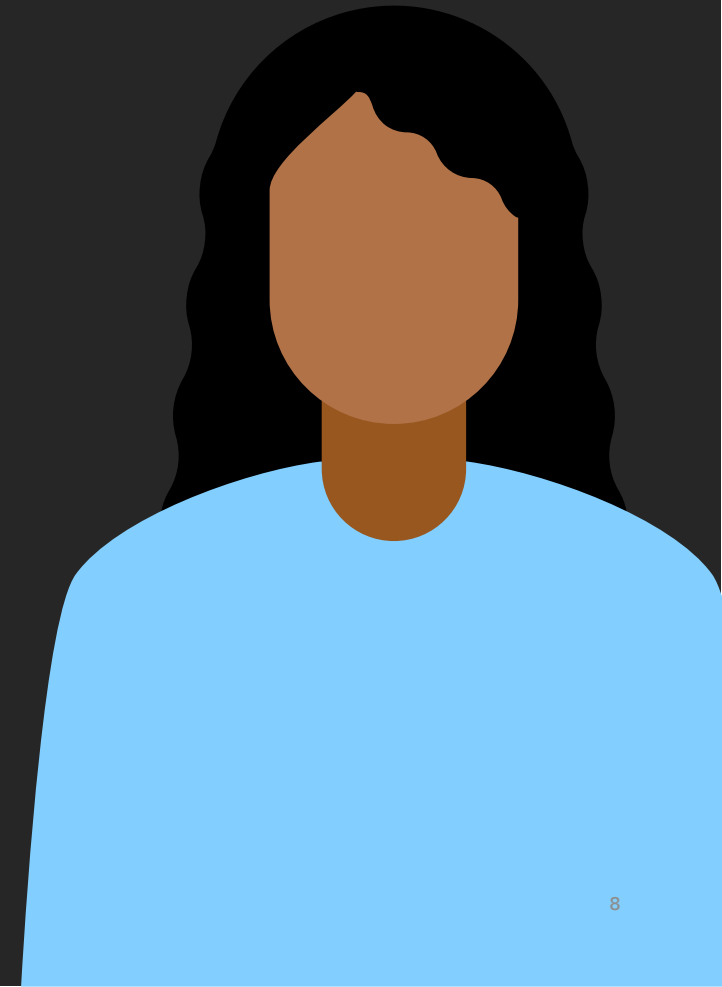
### Automate this

What compliance verification looks like when automated:

- Regulated item is automatically evaluated against predefined set of eligibility rules at point of sale, before order is confirmed
- Order is monitored and offerings adjusted to improve customer experience based on decision outcomes

### Don't automate that

Avoid automating advice in unclear situations—instead, make it quick and easy for customers to reach a friendly, well-informed human who can help.





# Automate this ...

## 6. Customer query response

### Issue

Meet Abdul. He handles an increasing volume of customer queries and transactions. Even with the help of basic chatbots, he can't always meet customer experience expectations for speed and quality. Often chatbot interactions end quickly because the chatbot has limited capabilities to respond accurately or because the customer doesn't know what he needs.

### Action

Integrate intelligent virtual agents (IVAs) into the systems used by the people who serve to improve efficiency and outcomes.

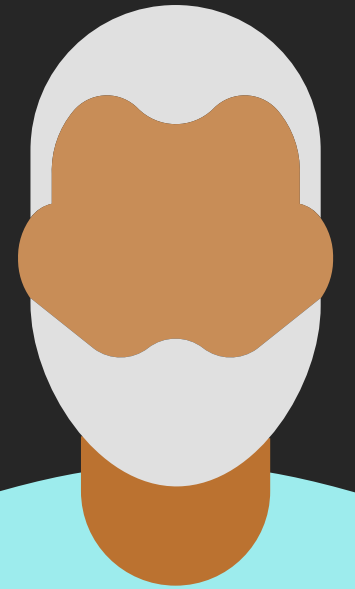
### Automate this

What responding to a customer query looks like when automated:

- Customer query is routed to an IVA, which is designed to emulate human service and support agents
- IVA guides customer using natural language processing (NLP) while interpreting the context and providing relevant answers and feedback
- If the bot can resolve the query, it executes the appropriate action but, if needed, the bot routes customer to human employee

### Don't automate that

Avoid automating actions that cause human employees to manage laborious tools or systems instead of connecting with customers.



# Key takeaways

If you've already started to digitize and automate key customer-facing processes, great news. You're in a better position to adapt and change to whatever customer behaviors persist as you build a pipeline of customer experience (CX)-focused automations, for now and later.

The capabilities that automate each of these use cases are part of IBM Cloud Pak® for Business Automation, a fully equipped, modular and open platform for automating virtually any type of work at scale. Its modularity is designed to help you fill urgent tactical gaps while laying the foundation for growth-driven automation. A subscription-based model allows you to start new projects quickly and affordably.

# Next steps

## Start with AI-driven task automation

Achieve faster ROI with full-featured robotic process automation (RPA).

[Learn more](#) →

## Get more than task automation

Gain advantage with a set of integrated software designed to help you solve your toughest operational challenges.

[Learn more](#) →

## Access strategic guidance and support

Prioritize quick-win automation projects at this half-day virtual workshop—at no charge.

[Request a workshop](#) →

© Copyright IBM Corporation 2021

IBM Corporation  
Route 100  
Somers, NY 10589

Produced in the United States of America  
August 2021

IBM, the IBM logo, and [ibm.com](http://ibm.com) are trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at “Copyright and trademark information” at [www.ibm.com/legal/copytrade.shtml](http://www.ibm.com/legal/copytrade.shtml).

This document is current as of the initial date of publication and may be changed by IBM at any time. Not all offerings are available in every country in which IBM operates.

The performance data and client examples cited are presented for illustrative purposes only. Actual performance results may vary depending on specific configurations and operating conditions.

THE INFORMATION IN THIS DOCUMENT IS PROVIDED “AS IS” WITHOUT ANY WARRANTY, EXPRESS OR IMPLIED, INCLUDING WITHOUT ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY OR CONDITION OF NON-INFRINGEMENT. IBM products are warranted according to the terms and conditions of the agreements under which they are provided.

00000000

