Your AI Readiness Guide for Contact Centers
For years, customer service has prioritized cost containment and contact deflection. But, today’s leading contact centers are equipping themselves to deliver 24/7 service on their customers’ preferred channels and solve more complex issues with greater speed and ease by implementing Augmented Intelligence (AI) capabilities. AI empowers a contact center to meet customers’ rising expectations while also fostering brand differentiation and customer loyalty. However, before your company can benefit from using AI, it first needs to be ready for it. In this guide, we walk through the necessary steps to build your business’s path to AI.

**Part 1 Business Ready**
Establish goals, internal alignment, and identify a strategic partner.

**Part 2 Data Ready**
Ensure data quality, access, and inventory.

**Part 3 Salesforce Ready**
Optimize your Salesforce platform and systems.
The Top Priorities for the Contact Center

This year, Service executives’ top priorities for the contact center are:

- Diversify and advance digital channels to resolve more kinds of questions on each type of channel.
- Make knowledge easily accessible to agents, digestible for AI to understand, and ensure it’s accurate.
- Use real-time, cross-channel engagement and insights for customer journey mapping/orchestration.
- Coach agents on recognizing cross-sell and upsell opportunities, and appropriately responding to customers’ complaints, concerns, and questions.
- Use AI to solve routine issues/questions to free up agents to handle more complex requests.

Where service organizations are increasing investment
Before knowing which AI solutions and technology to implement, it’s important to first audit your contact center with a holistic perspective. To choose which ideas to focus on, rank them based on their business value potential, benefit to customers, and overall complexity. Ideas with high strategic value and high customer benefit will show immediate value to the business and your customers. Next, rank those ideas by complexity. Those with the greatest strategic value potential and low complexity will yield the highest returns with the least amount of effort.
Align AI Use Cases to Business Outcomes

First, focus on what your organization is ultimately hoping to achieve. By identifying your business strategy from the start, you can make sure your AI use cases will achieve measurable goals. As businesses look to build a better customer experience, they are measuring the performance of their contact centers to reflect a customer-centric focus. Namely, instead of measuring against efficiency and cost savings, companies are looking at customer satisfaction along with customer effort, a measure of how easy it is for customers to do business with a company on each channel.

Top AI Use Cases

AI connects insights to action, transforming what you understand about your customers, how you interact with them, how you answer their requests, and guides how you serve and sell to them.

Top use cases for AI in the Contact Center

- Train AI-powered chatbots to handle simpler cases, freeing time for agents to handle more complex cases.
- Leverage chatbots in a blended fashion to manage entitlements—gathering initial data from the customer—before handing off to a “live” support agent.
- Use AI to route cases during busy traffic periods. AI can be trained to match cases with the best-suited agent.
- As customers become more multi-channel, use AI to uncover patterns and issues where the customer journey can be refined.
Establish Cloud Governance

How will you decide what gets done for the success of your new AI initiative? Without a decision-making framework for IT and the business, there’s no structure for plans and processes to drive value. Traditional governance that is designed around the management of on-premise systems isn’t suited to support cloud-based technologies. Cloud Governance is different. It coordinates the innovation and ongoing management of Salesforce as a platform. With a unified foundation between IT and the business, Cloud Governance enables responsive decision-making, cross-functional collaboration, and project execution that is tied to business goals.

7/10
7 out of 10 customers have a group dedicated to Salesforce governance

3 out of the 7 are following Salesforce best practices by implementing a cross-departmental governance team

Governance teams that are cross-functional are 2x more likely to enable innovation with Salesforce
Choose a Strategic Partner

Knowing how to choose the right strategic partner for your AI implementation and services is a challenge, but there are essential criteria that you should use to guide your search.

- Demonstrated Salesforce expertise across the entire cloud journey
- Proven integration and implementation track record
- Data migration and process optimization services
- Machine-learning knowledge and experience
- A strong partner ecosystem to deliver an end-to-end solution
- Industry domain expertise

Ensure Data Quality, Access, and Inventory

AI is only as powerful as the quality of the data it’s using. Invest early in data architecture and establish a data governance framework. For customer data to move freely between systems, data hygiene and integration across every department are key to the foundation of building AI capabilities into your business. AI is not merely an enhancement for a channel, but rather the basis for a new standard of customer experience delivery from the contact center.

Organizations with a data governance framework are outperforming their counterparts.

- 59% of companies with a data governance framework provide a cohesive customer experience
- 48% of companies without a data governance framework provide a cohesive customer experience
Integrate Data Outside of Salesforce

The most powerful AI will draw insights from data that is both within your CRM and outside of it. As part of a technical process review to investigate the current systems in place, you’ll determine what will be replaced and identify any necessary integrations to other systems. Integrating with other tools and systems takes time and comes with considerations around compatibility and security. Partnering with an experienced systems integrator (SI) is necessary to ensure the integrity of your integration design and development.

Once you’ve defined both your business and technical requirements, the process of real-time, batch, or user-triggered movement of data can begin, including:

- Integration of Salesforce with other enterprise and/or third-party systems
- Identification of data fields that will move between systems
- Timing of data feeds
- Error handling
- Reporting on results of the data migration
- Confirming the enterprise architecture defined as a part of the greater holistic project
- Single Sign-on
- Identification of Active Directory Groups
- Definition of permission sets
- Identification of trigger points
Rethink Your Salesforce Footprint

While your customers can’t see the size of your Salesforce footprint, they certainly do feel its effects from how they experience engagement with your brand. AI is driving a trend toward consolidation and re-centralization of CRM data, enabling valuable intelligence to be extracted from a complete set of customer data. Before investing further in Salesforce, forward-looking organizations are embarking on Org Rationalization—the process of developing a strategy for an existing Salesforce footprint. It answers the question: What are the alternatives to my current Salesforce footprint that will better support my business goals? An Org Rationalization involves evaluating and optimizing Salesforce Orgs according to their number, purpose, architecture, and inter-dependencies.
Keep Salesforce Valuable To Employees

Employee adoption is key to the success of AI for your business. However, all too often adoption is simply defined as login rates. Instead, engagement is a more accurate measure. Lightning Experience not only provides an updated, more intuitive UI but it’s also necessary for utilizing the full capabilities of Salesforce Einstein.

The transition to Lightning is underway

1/3 have already transitioned to Lightning

Another 3/3 plan to transition within the next year

Salesforce Ready
Are You AI Ready?

01 BUSINESS READY
- I have identified specific use cases for AI that align to business outcomes
- My company has internal consensus on use cases & stakeholders for AI
- I have identified an AI consulting partner who can assist me on this journey with Salesforce

02 DATA READY
- I have identified data quality issues and have a clean-up and new data access plan, as well as plans to prepare knowledge for AI
- I have an integration strategy and tools to access data and knowledge outside of Salesforce
- I have a data and knowledge inventory to power my AI use cases

03 SALESFORCE READY
- My Salesforce footprint—single or multi-org—has a unified data model
- My Salesforce Org has transitioned to Lightning Experience

AI READY
Bluewolf, an IBM Company, is the global consulting agency committed to helping our clients lead the future of business with Salesforce. Backed by the power and scale of one of the world’s most trusted technology companies, we enable organizations of any size and industry to use Augmented Intelligence (AI) as a competitive advantage and deliver deeper customer and employee moments—now.

bluewolf.com/contactcenter