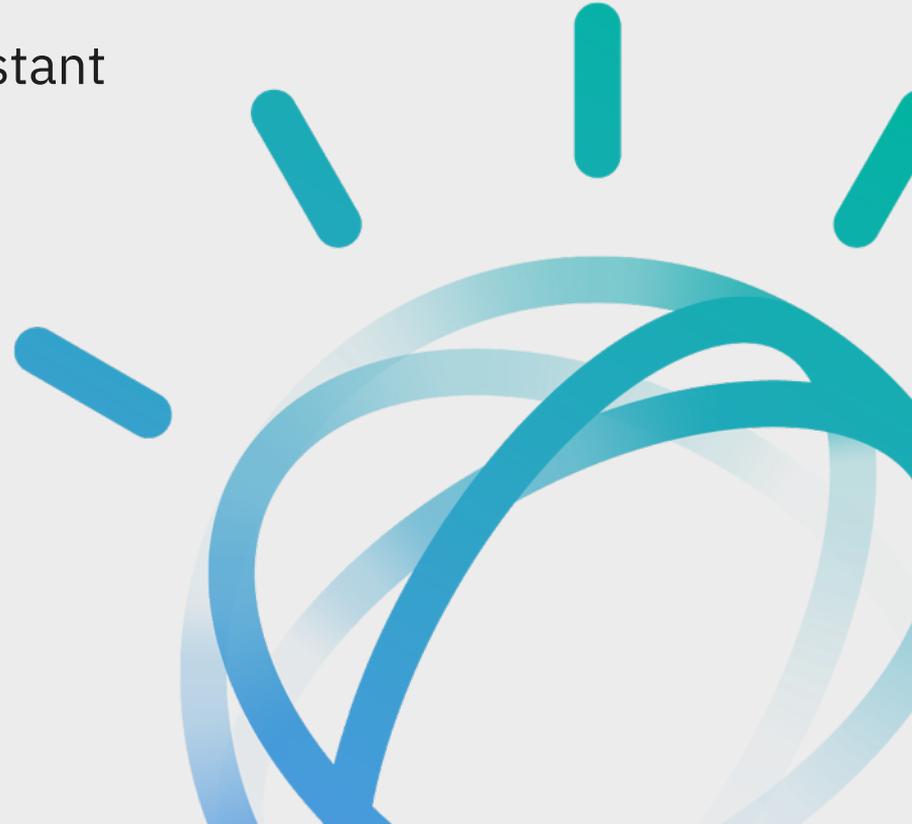


Marketing Guidance Toolkit for Business Partners

Customer Care with AI / Watson Assistant

Watson



Applying AI: Watson Assistant Marketing Guidance Toolkit Overview

This deck is intended to guide Watson Business Partner Marketing teams in the development of marketing materials and provide direction in conversations with key stakeholders. It is a BP resource organized to allow easy extracting of relevant sections or topics and not intended to be read as one continuous document.

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Customer Care with AI Campaign, Watson Assistant Summary

Target Industries

- Banking, Insurance, Federal, Travel & Transportation, Telco, Healthcare, Financial Services

Buying Group

Primary: Customer Service Exec

Secondary: LOB, VP/C level in IT

Influencers: Dev, Service Desk Managers

Tactical Mix

- Paid media, Events (Digital and F2F) , Social, Digital SEO, Sales Play integration, Account Based Marketing, IP Targeting

Important Links

- [Watson Selling Page for Business Partners](#)
- [Watson Assistant Product Page](#)
- [IBM's Customer Service AI Campaign Page](#)
- [How to build a chatbot page](#)

Overview

The top challenges customer service execs face today are providing a seamless customer experience while reducing costs. Businesses are adopting AI self service and agent assist tools to keep up with increasing customer demands. In fact, eight out of ten businesses have already implemented or are planning to adopt AI as a customer service solution by 2020.

Improve the customer experience

- 1. Ease of use:** Create a simple and effortless customer experience with a single point of contact your customers want to use, to potentially achieve an 85% satisfaction rate.
- 2. Answer complex questions:** Go beyond basic FAQ and give customers the materials to answer their most complex questions, at any time, by integrating with tools you use like Box and Salesforce.
- 3. Easy agent escalation:** Remove customer frustration with live agent handoff capabilities.

Empower agents with AI

- 4. Seamless Watson Handoff:** Once a question is resolved, give agents frictionless ability to pass the caller back to Watson for simple tasks.
- 5. Get answers quickly:** Surface relevant and accurate information through AI powered search, giving agents the power to respond to customer questions faster.
- 6. Decrease attrition:** Decrease repetitive tasks and provide agents with AI that seamlessly integrates into the tools they already use, alleviating frustration, decreasing attrition, and saving over \$5 million a year.

Scale conversational AI in your business

- 7. Robust Integrations:** Watson integrates with existing service desks and CRM systems, giving you access to all your data.
- 8. Watson Anywhere:** With an IBM Cloud Private for Data integration, you have the option to run Watson Assistant on clouds from other vendors, including Amazon, Google and Microsoft, as well as on-premises environments.
- 9. Reduce Cost:** Watson has already proven to save companies millions of dollars by infusing AI into their end-to-end customer service processes. From email automation to customer self service and agent training – you can significantly reduce operation costs with Watson.

Key Offering

- Watson Assistant
- Watson for customer self-service
- Watson for employee self-service
- Watson for agent assist

Watson Assistant Value Proposition

To the: cross-industry customer service executive

Who wants to: increase customer satisfaction and reduce agent attrition, while reducing costs

We are the only partner that can: deliver quick and consistent customer service experience across all touchpoints while also helping automate customer support operations – allowing employees to focus on higher value tasks

Through: IBM Watson Assistant, an offering for building conversational interfaces into any application, device, or channel

Because only we offer:

- **Data Control:** You maintain control and ownership of your data and IP. Watson Assistant can live in an isolated cloud environment or on-premises, allowing you to build and scale across your business with a trusted, secure partner.
- **Scalable Product:** An enterprise can go from a single user to supporting millions of conversations across its organization with a single product
- **Simplified Tooling:** Watson Assistant comes pre-trained with industry-relevant content. It can make sense of your historical chat or call logs, and it has a visual dialog editor – meaning it's never been easier to get started (developers not required).
- **Extended reach to your customers:** You have the flexibility to deploy Watson Assistant on your site, in a mobile app, on the phone, in messaging channels, and to customer service tools. It supports 13 languages, so you can communicate more effectively and extend your global reach.

As experienced by: Companies across more than 15 industries including automotive, banking & financial services, healthcare, telecommunications, manufacturing, and software and technology, that use Watson Assistant to develop distinct virtual assistants that uniquely represent their brand attributes

Value Proposition – Watson Assistant + IBM Cloud Private for Data (ICP4D)

To the: CIO and/or CXO, CDO, CFO of Public, FSS, and Comms industries

Who wants to: increase customer satisfaction and reduce costs by accelerating the deployment of AI in customer care, but is limited due to data security and regulatory constraints.

We are the only partner that can: deliver the AI solutions and underlying information architecture required to securely transform their organizations customer interactions and experiences while also helping automate customer support operations.

Through: Watson on ICP4D, IBM's open cloud-native data platform, customers gain powerful AI and machine learning capabilities pre-integrated with a flexible information architecture optimized to accelerate their journey to AI. Providing fast, secure access to data across their organization along with built in governance protection and compliance, ICPD creates the trusted foundation necessary for successful AI and can be flexibly deployed in any environment.

Because only we offer:

Watson

- **Multicloud by design:** Flexibly deploy, scale and manage all your data and AI assets, where you need them across public, private or on-premise environments.
- **End-to-end AI:** Drive productivity and compliance with a unified, fully governed platform and experience across the full AI lifecycle, from data collection through insight.
- **Faster time-to-value:** Leverage pre-built applications and integrations with leading ISVs.
- **Proven and Trusted:** Partner with the leader in applied enterprise AI.

Watson Assistant

- **Simplified Tooling:** Watson Assistant comes pre-trained with industry-relevant content (FSS, Comms, Public) and can make sense of your historical chat call logs, making it easy to get started and decreasing your time to value.
- **Extended reach to your customers:** You have the flexibility to utilize Watson Assistant wherever your customers engage with you, on your site, in a mobile app, on the phone, in messaging channels, and to customer service tools. It supports 13+ languages, so you can communicate more effectively and extend your global reach.
- **As experienced by:** Companies across more than 15 industries including banking & financial services, healthcare, telecommunications, and more, that use Watson Assistant to develop distinct virtual assistants that uniquely represent their brand attributes.

ICP4D

- **Simplify data access:** Enable flexibility in the face of ever changing data sources by providing access to all enterprise data, regardless of type or location, through a single platform and experience without the need for migration.
- **Build a trusted analytics foundation:** Create, manage and share common business language, document and enact policies and rules and track data lineage across all your data assets with built-in governance, protection and compliance.
- **Modernize:** Seamlessly extend your platform through a growing catalog of 3rd party, partner and IBM microservice add-ons to further customize the data and AI capabilities to suite your needs.

Buyer Problem – By the Numbers

The value of virtual assistants for businesses is realized across industries:

- By 2020, 25% of customer service and support operations will integrate virtual customer assistant technology across engagement channels, up from less than 2%
- By 2020, 10% of business-to-consumer, first-level engagement requests will be taken by virtual customer assistants,

Yet growth in the adoption is being slowed by a new set of unique challenges:

Customers:

- Enhancing customer experiences continues to be a major priority for businesses, yet companies lose over \$62 billion each year because of poor customer service.
- The stakes are high for businesses – 62% of consumers consider switching to a competitor after one or two poor experiences.
- Yet of the 270 billion service calls made annually, 50% of first calls go unresolved.
- Customers expect quick and efficient service, but are often provided multiple and confusing paths to answer their questions. When customers use self service options, they are often disappointed with a poorly trained chatbot and are left with their queries unresolved.

Agents:

- Currently, in a 6 minute customer service call, 75% of that time is devoted to agents doing manual research, with valued customer interaction at a dismal 25%.
- When resolving customer queries, agents spend a majority of their time searching through multiple systems and documents to find answers, increasing average handle time and frustrating customers. The increased effort for solving customer questions often results in high agent attrition, the leading issue in contact centers today.

Enterprises:

- Getting started with a robust AI customer service solution that provides engaging experiences can take a business months to stand up. From gathering data, hiring teams, training AI and integrating into existing CRM / service desk systems, the process is costly and averages 3 – 6 months.
- 60% of companies see compliance as barriers to achieving success in applying IA, because they cannot trust the decisions.
- Only 20% of AI-aware executives use any AI-related technology at scale or in a core part of their businesses (McKinsey).

Kayla



Target Audience: Customer Service Executive

As the VP of Customer Service, Kayla is the key executive for customer support, client interactions, online sales and other elements of the customer experience. (Company: Mid to Large size, Cross-industry)

| Does | Says | Thinks | Feels |
|---|---|---|---|
| <p>Improves the customer experience</p> <ul style="list-style-type: none"> • Manage the end-to-end customer experience lifecycle, from first contact through service connection and ongoing support. • Define and evangelize the overall customer lifecycle experience. • Provide a “Voice-of-the-Customer” feedback loop to the business. <p>Manages and leads her peers</p> <ul style="list-style-type: none"> • Development of support processes, communication policies, employee training, and even in developing customer-service based selling. • She must be able to manage crises and mitigate service failures, especially in cases where the company is at fault. | <p>We need to be customer-focused</p> <ul style="list-style-type: none"> • Develop and implement loyalty strategies and programs. <p>We need to reduce costs</p> <ul style="list-style-type: none"> • Long-term planning to ensure capacity needs are met globally and service levels are achieved within budget. • Reduce call center cost. Enable call center operation that is low cost and high value for customers. | <p>Be Customer-focused</p> <ul style="list-style-type: none"> • Believes customers are an asset and they are the defining measurement of success. • Improve brand reputation and increase customer satisfaction and retention. • About customer segments and behaviors. <p>Be Cost Effective</p> <ul style="list-style-type: none"> • Customer service activities constitute a cost center for Emily’s company, so Emily needs to create opportunities to reduce client contacts (such as phone calls) and increase self-service support. <p>Stay Innovative</p> <ul style="list-style-type: none"> • How do we beat our competitors through customer experience • What are other companies doing to differentiate themselves in this arena? | <p>Guided by a Personal Compass</p> <ul style="list-style-type: none"> • Personal values influence work and decisions. • Values Work/Life Balance. <p>‘All in’ at Work</p> <ul style="list-style-type: none"> • Personal Responsibility. • Passion for Work . <p>Driven by Numbers</p> <ul style="list-style-type: none"> • Optimization is everything – will not implement a new system without data • Constantly evaluating customer service performance to find holes and opportunities for improvement |

| | |
|---|---|
| <p>Challenges (Pain Points): Worries about...</p> | <p>Drivers (Motivators): Is motivated by...</p> |
|---|---|

| | |
|--|--|
| <p>Abundance of data</p> <ul style="list-style-type: none"> • Successfully integrate data from multiple sources and apply analytical tools to get a complete customer view, including accurate, timely information on customer needs and operational success. <p>Keeping customer happy</p> <ul style="list-style-type: none"> • Quickly and easily respond to customer issues and provide them with timely and relevant information. • Increase automation of customer service functions, and promote customer self-service through online, mobile and social platforms. • Overcome difficulties in attaining a singular and holistic view of the customer. • Reducing customer churn. | <p>Personal Relationships</p> <ul style="list-style-type: none"> • The team, collaboration. • Getting alignment & buy-in with team members. <p>Personal Experience</p> <ul style="list-style-type: none"> • Wants to satisfy customers in the way that she herself wants to be treated as a consumer. <p>Beating Competitors</p> <ul style="list-style-type: none"> • Constant innovation • Outthinking competitors • Bold moves • Implementing new technology to better company and performance |
|--|--|

Influencers



MARY
The Line of Business Owner or Executive

Mary's goal is to ensure the best possible experience for customers and prospects that interact with her brand. She has the budget and influence to bring new solutions to her business.

She wants to ensure customers have a great experience at every interaction without breaking the bank.

She wants their brand to be authentic, accessible, and trusted consistently across multiple channels.



DEB
The Developer

Working on the front line of IT and LOB digital transformation, Deb uses her front end web interface skills and knowledge of front end and back end technologies to create, integrate, and customize new and existing apps.

It is important to note that Deb is an influencer and a buyer. She will share Emily's concerns in this case.

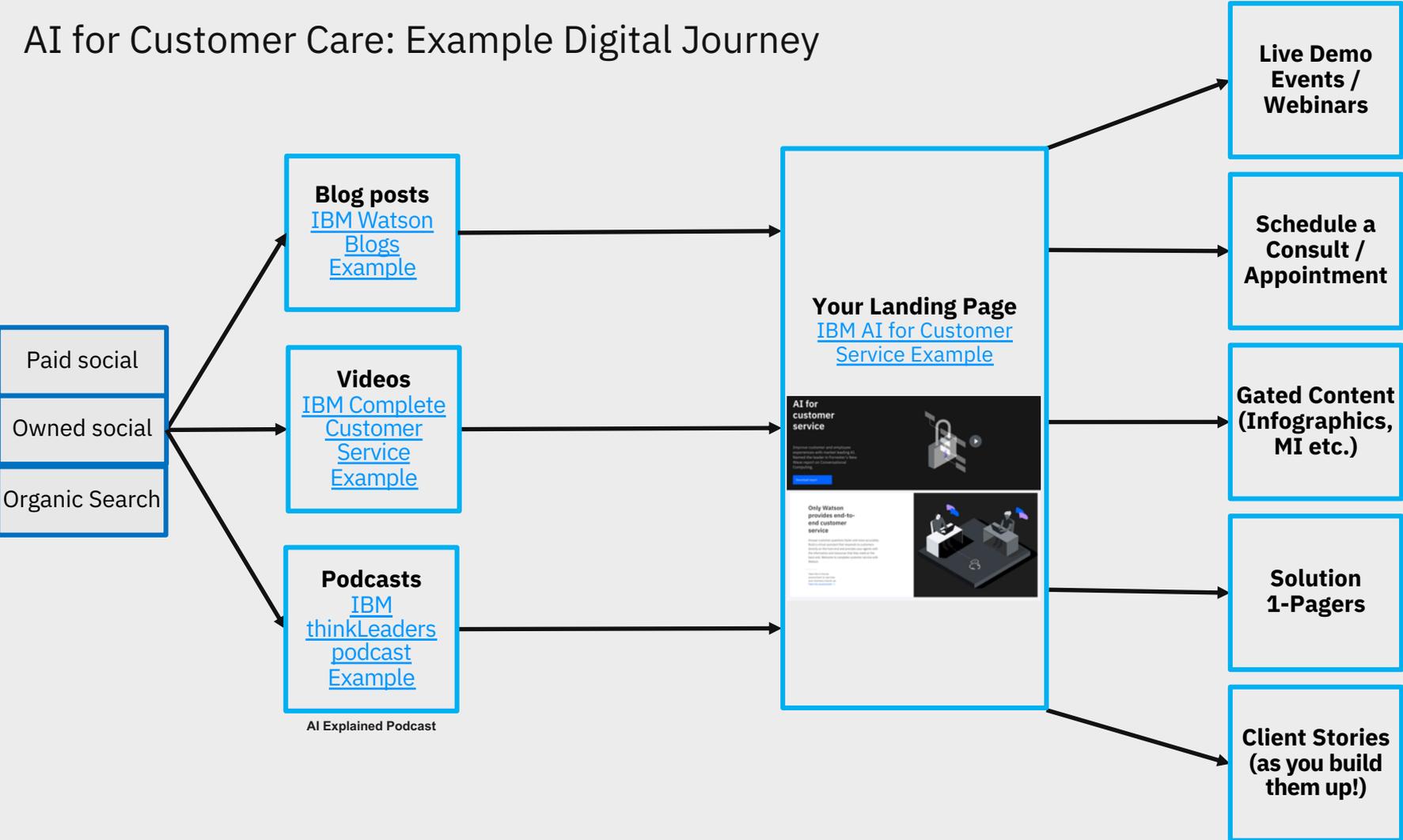
Target Industry Vertical Guidance

Top Industry opportunities by market size and growth rate

- Intelligent Virtual Assistant market: Consumer Electronics, Banking and Financial Services, Travel and Hospitality, Retail, Healthcare
- Contact Center Software market: Banking and Financial Services, Consumer Goods and Retail, Healthcare, IT and Telecom

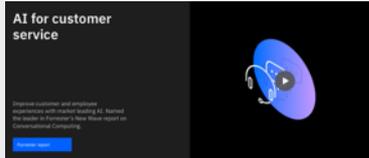
Additionally, the following industries have shown superior response and conversion in recent IBM campaigns: Telco, Government/Federal and Banking

AI for Customer Care: Example Digital Journey



Digital Strategy

Campaign Page (Paid Media)



Audience

- LOB (primary)

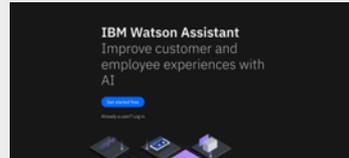
Page Intent

- Learn more about AI in customer service/call center
- Pricing
- Case studies

Primary CTA

1. Register for content on page
2. Schedule a Consultation

Product Page (Organic)



- Technical/Developer (Primary)
- LOB (Secondary)

- Differentiating features / functions
- Share pricing & dev documentation
- Demo of product

1. Get Started (Sign up for Cloud Trial)
2. Learn More

Search Capture Page (Organic)



- Technical/Developer (primary)

- Organic inbound for technical Developer Audience
- Differentiating features / functions
- Share pricing & dev documentation
- Demo of product

1. Get Started (Sign up for Cloud Trial)

Social Media Guidelines

****Always use up-to-date photos, branded logos and graphics, VCPIs for your landing pages, and shortlinks****

Twitter

- Reach: General audience, developers, businesses, C-suite, individuals interested in learning about AI
- 280 characters
- Copy: The shorter the better
- Hashtag usage –
- stick to 1-2 hashtags
- use trending or industry hashtags for relevancy – avoid creating "new" tags
- to gauge popularity, reference hashtagify.com
- Best for: most content, as well as specific to devs (ie youtube tutorials)

Facebook

- Reach: General audience
- Limit posting on this platform, as organic reach has diminished significantly
- Best for: Only IBM Watson general news
 - Ex: Watson Anywhere, Ginni Rometty + AI quotes

LinkedIn

- Reach: C-suite, business professionals, developers, organizations looking to adopt AI to business
- Copy: no character limit, can be a little longer than
- Best for: Webinars, event promotion, campaigns

PLAN YOUR SOCIAL STRATEGY FOR A CAMPAIGN LAUNCH

- Gather all deliverables (copy documentation, VCPI links, design assets)
- Create a cadence for publishing across each platform

Recent Customer Service and AI examples

<https://twitter.com/IBMWatson/status/1114242893965864960>

<https://twitter.com/IBMWatson/status/1114242835182772225>

<https://twitter.com/IBMWatson/status/1086058703713980417>

Watson Assistant creative

Included in DCM Collateral collection [here](#)

Watson Assistant Content

| | |
|--|-----------------------------|
| Recent Watson Blogs | LINK |
| thinkLeaders podcast: How human should a chatbot be? | LINK |
| How to retain customers and agents with AI | LINK |
| Introducing Watson Assistant Plus pricing plan and new powerful features | LINK |
| Watson services now available on-premises | LINK |
| From RoboChat to RoboBrain: UBank uses Watson to enhance customer satisfaction | LINK |
| 6 steps to successful conversational design | LINK |
| How conversational AI concepts enrich customer service interactions | LINK |
| Getting started with conversational AI | LINK |

| | | |
|---|---|-----------------------------|
| Briefs/One Pagers/Demos/Sales Kit | | LINK |
| Watson Assistant Solution 1 pagers | Overview of WA features, differentiators and pricing. Zip file including several Customer Care and Watson Assistant 1-pagers. | LINK |
| Customer Starter kit for BPs | Single pdf with industry stats, key benefits, solution descriptions and case studies | LINK |
| Live Customer Care Demos | Single pdf with links to three Customer Care demos tying to key use patterns: Virtual Agent, Voice Agent and Agent Assist. Each demo includes Client presentations, demo instructions/URLs/scripts and links to further related learnings | LINK |
| Sales Kit | Watson Selling page for Business Partners – see the Watson Assisting Sales Kit including MI, Client Presentations, above solution docs, live demos, technical enablement guides and other key learnings | LINK |

| | | |
|--|---|-----------------------------|
| Analyst Reports | | LINK |
| The Forrester New Wave™: Conversational Computing Platforms | IBM Watson Assistant is named as a Leader in conversational computing. Licensed for Business Partners to use (once on the page, scroll down to Watson Section) | LINK |
| IDC Industry Trends | Learn about key 2019 trends / predictions from IDC covering the following Industries: Manufacturing, Hospitality and Travel, Telecommunications, Health and National Government | LINK |

Other IBM Watson Assistant Content for reference

| Videos | | DG Asset | LINK |
|--|--|----------|----------------------|
| Watson Assistant Demo | Demo video of Customer Care Virtual Agent and Customer Care Voice agent, lives on on Customer Service AI page. | No | LINK |
| Complete Customer Service Video | 1 minute video on IBM's POV of AI in customer service. | No | LINK |
| Use case: Vodafone | Video highlighting how Vodafone UK Is Transforming Customer Service with Watson. | No | LINK |
| Use case: Autodesk | Video highlighting How Autodesk sped up customer response times by 99% with Watson. | No | LINK |
| Technical Video Playlist | Series of tech talks. | No | LINK |
| Masterclass Series | Getting started masterclass on customer service and AI. | Yes | LINK |

| Other | | DG Asset | LINK |
|-----------------------------|---|----------|----------------------|
| Customer Service Assessment | Client facing 5 minute assessment to see how a user's call center stacks up. Generates a nice summary report that can be printed for the client. | Yes | LINK |

Watson Assistant Case Studies and other content

| Geo/Country | Industry | Client Stories |
|--------------------|----------------------------|---|
| AP/Australia | Banking/Fintech | https://www.ibm.com/blogs/watson/2018/10/from-robochat-to-robobrain-ubank-uses-watson-to-enhance-customer-satisfaction/ |
| EU/Germany | Insurance | https://www.ibm.com/case-studies/inter-versicherungsgruppe-watson-cloud |
| EU/Germany | Travel/Transportation | https://www.ibm.com/case-studies/dbdialog-dbsystel-ai-watson-chatbot-assistant |
| EU/Italy | Retail | https://www.ibm.com/case-studies/mondadori-store-hybrid-cloud |
| EU/Spain | Education | https://www.ibm.com/case-studies/watsomapp-ai-watson-school |
| EU/Spain | Public Safety | https://www.ibm.com/case-studies/netun-solutions |
| EU/Spain | X-Industry/HR Solutions | https://www.ibm.com/case-studies/vidahora-watson-employee-engagement |
| EU/UK | Banking/Financial Services | https://www.ibm.com/industries/banking-financial-markets/front-office/chatbots-banking |
| EU/UK | Entertainment/Media | https://www.ibm.com/case-studies/all-england-lawn-tennis-club-wimbledon |
| EU/UK | Entertainment/Media | https://www.ibm.com/case-studies/deltic-group-watson-virtual-assistant-for-social-media |
| EU/UK | Health/Non-profit | https://www.ibm.com/case-studies/arthritis-research-uk |
| NA/Canada | Online Retail/Commerce | https://www.ibm.com/case-studies/dollar-tea-club |
| NA/US | Insurance | https://www.ibm.com/case-studies/codeobjects |
| NA/US | Software | https://www.ibm.com/case-studies/autodesk-inc |
| NA/US | X-Industry | https://www.ibm.com/case-studies/the-gordon-flesch-co |
| NA/US | X-Industry/Contact Center | https://www.ibm.com/case-studies/chatmantics-voice-agent-watson |
| NA/US | X-Industry/ERP | https://www.ibm.com/case-studies/hansaworld-cloud-watson-erp |
| LA/Brazil | Banking/Financial Services | https://www.ibm.com/watson/stories/bradesco/ |
| LA/Mexico | Banking | https://www.ibm.com/case-studies/nearshore-delivery-solutions-cloud-ai-banking-chatbot |
| MEA/S. Africa | Entertainment/Media | https://www.ibm.com/case-studies/multichoice-south-africa-ai-watson-broadcast-cloud |