AI in CRM
what is AI?

Artificial intelligence

From Wikipedia, the free encyclopedia

"AI" redirects here. For other uses, see AI and Artificial intelligence (disambiguation).

Artificial intelligence (AI) is intelligence exhibited by machines. In computer science, the field of AI research defines itself as the study of "intelligent agents": any device that perceives its environment and takes actions that maximize its chance of success at some goal.[1] Colloquially, the term "artificial intelligence" is applied when a machine mimics "cognitive" functions that humans associate with other human minds, such as "learning" and "problem solving" (known as machine learning).[2] As machines become increasingly capable, mental facilities once thought to require intelligence are removed from the definition. For instance, optical character recognition is no longer perceived as an example of "artificial intelligence", having become a routine technology.[3] Capabilities currently classified as AI include successfully understanding human speech,[4] competing at a high level in strategic game systems (such as chess and Go)[5], self-driving cars, intelligent routing in content delivery networks, and interpreting complex data.
what is AI?

"Over the past decades computers have broadly automated tasks that programmers could describe with clear rules and algorithms. Modern machine learning techniques now allow us to do the same for tasks where describing the precise rules is much harder."

Jeff Bezos
April 2017
what is AI?

my take?

Advanced Analytics
Over the Last Few Years

- Memory Capacity
- Processing Power
- Sensors Diversity
- Batteries Efficiency
- Size
- Price
- Energy Consumption

![Graph showing changes over time](attachment:graph.png)
enough theory, why do I care?

digital transformation
citizen programmers
age of the customer
evolution of experiences to ML

classification: 
- transformation 
- predictive 
- prescriptive 
- cognition 

analytics

company
- optimized processes
- personalized profiles

best paths profiles x processes (analytics)
repeatability of automated paths (automation)

machine learning for optimized paths (AI)

confidence of outcome (grows with engagement)
evolution to AI + ML

- **Reporting**
  - (what happened?)

- **Dashboard**
  - (what's happening?)

- **Descriptive**
  - (metrics)

- **Predictive**
  - (forecast)

- **Prescriptive**
  - (likelihood)

- **MACHINE LEARNING**
  - (weighted suggestions)

- **Artificial Intelligence**
  - (fully automated)

- **“Black box” of analytics**

- Paradigm shift: moving to data-based recommendations
- Paradigm shift: moving to computer-initiated actions
- Paradigm shift: moving to computer-based recommendations

- **Awareness**
- **Actionable**
- **Automated**
how AI affects the enterprise (functionally)

**PREDICT**

**AUTOMATE**

**CLASSIFY**
how AI affects the enterprise (outcomes)

OPTIMIZE

PERSONALIZE

AUTOMATE
## How AI Affects Sales

<table>
<thead>
<tr>
<th></th>
<th>Predict</th>
<th>Automate</th>
<th>Classify</th>
<th>Optimize</th>
<th>Personalize</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pipeline Management</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Pricing Optimization, CPQ</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Deal Flow, Methodology</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Lead Scoring</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Account Management</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
## How AI Affects Marketing

<table>
<thead>
<tr>
<th></th>
<th>Predict</th>
<th>Automate</th>
<th>Classify</th>
<th>Optimize</th>
<th>Personalize</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Campaign Management</strong></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Content Management</strong></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Lead Scoring</strong></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Calendar Management</strong></td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td><strong>Funnel Distribution</strong></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
### how AI affects service

<table>
<thead>
<tr>
<th></th>
<th>PREDICT</th>
<th>AUTOMATE</th>
<th>CLASSIFY</th>
<th>OPTIMIZE</th>
<th>PERSONALIZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>WORKFORCE MANAGEMENT</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>KNOWLEDGE MANAGEMENT</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>BREAK-FIX</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>FIRST TIME RESOLUTION</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CUSTOMER SATISFACTION MEASUREMENT</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
AI in CRM in your enterprise – framework

• Questions to ask
  • What are my goals?
  • Can the processes underlying the goals be automated?
  • Can the company and the user benefit equally?
  • Can we be non-invasive? Non-spooky? Non-intrusive?
  • Is there a demand?
  • Functional approach (PAC)? Or Outcome-driven approach (OPA)?
  • What else is going on?
  • Where do I start? End?
KEEP CALM AND ASK YOUR QUESTIONS
AI in CRM

Esteban Kolsky
thinkJar
@ekolsky
esteban@thinkjar.net