SERVISBOT

POWERING AUTOMATION & DIGITAL ENGAGEMENT WITH CONVERSATIONAL AI BOTS

Advanced Customer/Employee Engagement
Use Cases for Conversational AI

TABLE OF CONTENT

ENTERPRISES ARE HOT ON CONVERSATIONAL AI

Conversational AI may sound complex, costly, and even a little intimidating. It's even a little bit of a mouthful. Hence, many people prefer the more colloquial term, chatbot. But to refer to today's more advanced conversational AI solutions that are being adopted in the enterprise as mere chatbots can be misleading and undervalues the true nature and power of conversational AI.

Conversational AI is more than just chat and more than just bots that provide canned responses to questions. It is a branch of artificial intelligence that is fundamentally transforming how we as customers and/or employees engage and interact, whether through speech, messaging, texting, touch, or vision. By understanding language, context, and sentiment, and integrating with various data sources and business systems, conversational AI solutions can deliver more personalized engagement while automating a broad range of interactions and tasks that we initiate each day.

Over the last few years interaction-intensive businesses have launched chatbot solutions, mainly implementing customer service bots on their websites to answer common queries and boost self-service levels. Like many automation solutions, these led to cost savings but also invariably had the added benefit of enhancing the customer experience.

In 2020, as the global pandemic hit and businesses had to quickly pivot their business models to fully virtual, the allure of digital assistants suddenly became clear and the urgency to implement chatbot solutions spiked. Their success exceeded many expectations and spurred enterprise leaders to expand the technology to other areas of their business to either fully or partially automate interactions and workflows that were heavily dependent on human workers.

Not only did they discover greater automation potential, they were also able to augment their skills pool by having human workers focus on higher value or edge case engagements while the AI bots could handle the more repetitive tasks. It is now commonly recognized that bots and humans can offer a perfect blend of skills that lead to better business outcomes.

> " Chatbots are projected to see over a 100% increase in their adoption rates in the next two to five years and are the leading AI use cases in enterprises today."
>
> **Gartner's Hype Cycle for Artificial Intelligence, 2020**

MATURING FROM CHATBOT #1

Organizations generally launched their first chatbot without much concern for the future steps in their journey. For many, the true impact of their first chatbot project only emerged post-launch, with many insightful learnings guiding their next steps and priorities.

How enterprises are now evolving their conversational AI journeys can take different forms. For example, they may focus on:

► **Improving and extending the capabilities of their existing bots with the aim of enhancing the experience, increasing the reach, or driving further automation.**
► **Implementing the technology for additional business use cases, either within or outside the same business area.**
► **Consolidating the diverse chatbot solutions that they have in production and standardizing on a single platform or managing their multi-bot environment more efficiently.**

There are a surprising number of different business use cases for conversational AI technology. Beyond the common inbound customer service scenarios, there are other interesting and advanced use cases, both for inbound engagements in other operational departments as well as for proactive outbound campaigns or sequenced chasing (such as in the case of debt collections or renewals).

Advancements in speech recognition, machine learning, OCR (optical character recognition), sentiment analysis, and analytics are also creating opportunities for some interesting use cases. Take document capture and processing as an example. This lends itself to use cases that require a company to gather proof documents and validate them prior to approval or sign-off.

Loan applications, customer onboarding, patient care, insurance policy adjustments, government services, and many other workflows and industries depend on the submission and validation of documents. If a bot is deployed to request the required paperwork from a customer these can be gathered via image uploads and validated on the spot. Think of the tedious and labor-intensive steps that are eliminated!

SERVISBOT

8 ADVANCED USE CASES FOR CONVERSATIONAL AI

The potential for AI bots is boundless and progressive companies are willing to apply the technology to areas outside the usual FAQ and customer service applications. If you consider the spectrum of interactions that your customers can have across multiple departments and over time, the list starts growing.

Here we will profile 8 use cases for conversational AI that demonstrate the breadth of their reach across different parts of the business as well as different capabilities that make them extremely valuable digital workers in delivering different business outcomes.

8 ADVANCED BOT USE CASES FOR CONVERSATIONAL AI

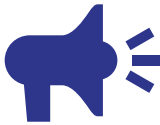### Digital Reception
Reduce Cost @ Improved Customer Experience

Onboarding Bot
Reduce Cost & Time to Onboard

Quote Bot
Increase Click to Quote & Quote Conversion

Campaign Bot
Enhanced Customer Loyalty & Retention

Application Bot
Reduce Cost & Improve Customer Experience

Account Bot
Reduce Cost & Increase Customer Compliance

Renewal Bot
Increase Renewal %

Collections Bot
Increase Cash Flow & Collections

SERVISBOT

Digital Reception Bot

Bot Mission

Single access point for customers/employees that can triage requests and then route to the bot or human worker best suited to handle the request. Similar to a human receptionist or an IVR, the digital reception bot knows which skills to divert the request to.

Target Industries/Use Cases

All industries (B2C and B2E), Government, Contact Center/BPO

Bot Features	Multi-lingual
	Authentication
	Personalization
	Context-switching
	Human Handover (with chat history)
	Chat history
	Orchestration (of multiple skilled bots)
	Proactive Re-engagement
	Performance Analytics
Integrations	Contact Center Systems incl Live Chat, integration with use case specific business systems (e.g. CRM, HCM)
Channels	Phone, Web, Mobile, SMS, Messaging, Email, Voice

Potential for Collaboration

Customer Service, Tech Support, HR, Billing, Payment, Complaints, & many other skilled bots.

Customer Benefits

24/7 convenience

Consistent brand experience

Single point of access

Smooth & frictionless handoffs

Reduced frustration of repeating request/ info in handoffs

Business Outcomes

Reduce cost to serve

Enhanced customer/employee experience

Reduce #live chats

Increase agent utilization

SERVISBOT

Quote Bot

Bot Mission

Assist a customer in completing an online quotation form or help them through a quotation engagement on other channels, guiding them through the steps, answering queries, requesting to recommend the best quote, and capturing signature.

Target Industries/Use Cases

Insurance, Telcos, Utilities, Manufacturing, Retail, Services.
B2C use cases where quotations/negotiation are involved.

Bot Features	Multi-lingual
	Web Co-browsing
	Form fill
	Human Handover (with chat history)
	Chat history
	Orchestration (of multiple skilled bots)
	Proactive Re-engagement (towards completion)
	Performance Analytics
Integrations	Quotation Engines, CRM, Live Chat
Channels	Web, Mobile, SMS, Messaging, Email, Voice

Potential for Collaboration

Application, FAQ, Proactive Re-engagement, Campaign bots

Customer Benefits

24/7 convenience of getting quotations

Greater transparency on complex criteria or terms

Less friction

Find best price & terms

## Business Outcomes

Increase online sales conversion rates

Increase ROI on digital advertising

Reduce #live chats/calls for standard quotes

Increase agent productivity

Improved customer and agent satisfaction

Application Bot

Bot Mission

Assist a person through an application process, answering queries and providing clarification along the way, gathering/validating relevant information or image/doc uploads, populating an online application form, negotiating offers/terms, capturing e-signature, and proactively en-engaging to drive completion/sale.
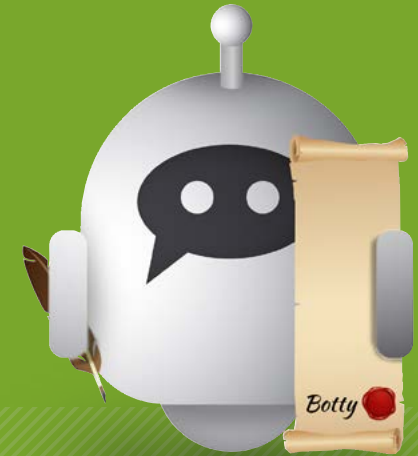
Target Industries/Use Cases

Banking, Insurance, Travel, Telco, Utilities, Education, Government.
Subscription, membership, loyalty & other application use cases for B2C and B2E.

Bot Features	Multi-lingual
	Web Co-browsing
	Form fill
	Document Upload/Download
	E-signature
	Human Handover (with chat history)
	Chat history
	Orchestration (of multiple skilled bots)
	Performance Analytics
Integrations	Sales/CRM/HCM systems, Subscription systems, Live Chat, etc.
Channels	Phone, Web, Mobile, SMS, Messaging, Email, Voice

Potential for Collaboration

Post-Quote Sales, Upsell, Scheduling, Payment, FAQ, Proactive Re-engagement, Campaign bots

Customer Benefits

24/7 convenience of applying for product/service/membership
Access to relevant/realtime information
Less friction

Business Outcomes

Increase online sales conversion rates
Reduce cost of handling applications
Reduce #live chats/calls/white mail
Improve agent utilization
Enhanced customer & agent satisfaction

Renewal Bot

Bot Mission

Proactively reach out to remind customers of upcoming renewals on policies, licences, subscriptions etc. and answer any queries they have regarding price/terms of renewal. Offer promotions or price-matching to encourage retention. Capture e-signature on renewal contracts and verify payment method and/or other profile details.

Target Industries/Use Cases

Insurance, Government, Service, Software
B2C use cases

Bot Features	Proactive Outbound
	Multi-lingual
	Document Upload/Download
	E-signature
	Negotiation
	Human Handover (with chat history)
	Chat history
	Orchestration (of multiple skilled bots)
	Performance Analytics
Integrations	CRM, Policy or other internal business systems, Live Chat
Channels	SMS, Messaging, Voice, Email (with channel shift to web/mobile if needed for security).

Potential for Collaboration

Campaign, Upsell, WinBack, Payment, Collections, FAQ, Proactive Chase bots

Customer Benefits

Timely and frequent renewal reminders on digital channel

Better transparency on pricing/terms

Opportunity to negotiate on price/terms

Less friction

Business Outcomes

Increase retention rates

Reduce agent time chasing customers by phone, email.

Reduce cost of renewals

Increase upsell revenue on renewals

Improve agent utilization

Enhanced customer & agent satisfaction

SERVISBOT

Onboarding Bot

Bot Mission

Automate onboarding journeys by responding to queries, capturing & validating proof documents, clarifyinging contracts and capturing e-signatures. Includes chasing customers/employees to complete onboarding steps.

Target Industries/Use Cases

Customer Onboarding—Banking, Insurance, Government, Technology.
Employee onboarding—all industries

Bot Features
- Authentication
- Multi-lingual
- Web Co-Browse
- Document Upload/Download
- Document Validation
- E-signature
- Human Handover
- Chat history
- Orchestration (of multiple skilled bots)
- Performance Analytics

Integrations
CRM, Policy or other internal business systems, Live Chat

Channels
SMS, Messaging, Voice, Email (with channel shift to web/mobile if needed for security).

Potential for Collaboration

Document, Payment, Policy, FAQ, Proactive Chase bots

Customer Benefits

Faster and More Convenient Onboarding

Less Friction

More Transparency on complex queries

Business Outcomes

Faster time to revenue

Reduce agent time chasing customers/ employees for docs

Reduce cost of onboarding

Lower abandonment

Enhanced customer & agent satisfaction

SERVISBOT

Campaign Bot

Bot Mission

Proactively reach out to customers/members to notify them of promotions or offers, reminders about upcoming appointments, payment dates, events etc. Offer personalized promotions based on customer status, location, prior purchases, etc.

Target Industries/Use Cases

All industries (B2C & B2E)

Bot Features	Multi-lingual
	Proactive
	Negotiation
	Chat history
	Orchestration (of multiple skilled bots)
	Performance Analytics
Integrations	CRM, Marketing and other Business Systems
Channels	SMS, Messaging, Email, Web, Mobile, Voice

Potential for Collaboration

Sales, Upsell, Payment, Renewal, FAQ, Proactive Chase bots

Customer Benefits

Access to Relevant Promotions

Personalized Offers

Price Matching

Business Outcomes

Lower cost of running campaigns

Increase sales conversions

Increase customer loyalty

Enhanced customer & agent satisfaction

SERVISBOT

Account Bot

Bot Mission

Retrieves customers' account information—account balance, payment due dates, most recent transactions, payment methods etc. Responds to account related queries. Makes account changes.

Target Industries/Use Cases

Banking/Financial Services, Energy & Utilities, Government, Healthcare, Insurance, SaaS & Service Providers

Bot Features	Authentication
	Multi-lingual
	Redaction
	Human Handover
	Chat history
	Orchestration (of multiple skilled bots)
	Performance Analytics
Integrations	CRM, Financial systems, Live Chat
Channels	SMS, Messaging, Email, Web, Mobile (channel shift to secure web/ mobile if needed)

Potential for Collaboration

Payment, Collections, Renewal, Onboarding, and FAQ bots

Customer Benefits

Convenience of Self-Service

Personalized and Secure

Better Financial Management

Business Outcomes

Lower cost to serve

Better agent utilization on complex account queries

Improved customer & agent experience

Collections Bot

Bot Mission

Proactively reach out to customers with reminders on past due payments, negotiate and collect payments, reaching them more easily on digital channels (SMS, messaging etc.)

Target Industries/Use Cases

Banking/Financial Services, Energy & Utilities, Government, Healthcare, Insurance, and Service Providers.

Bot Features	Authentication
	Multi-lingual
	Redaction
	Negotiation
	Human Handover
	Chat history
	Orchestration (of multiple skilled bots)
	Performance Analytics
Integrations	CRM, Financial/Accounting systems, Live Chat
Channels	SMS, Messaging, Email, Web, Mobile (channel shift to secure web/ mobile if needed)

Potential for Collaboration

Payment, Collections, Renewal, Onboarding, and FAQ bots

Customer Benefits

Timely reminders that help avoid penalties and debt collectors

Chance to negotiate a suitable payment plan

Business Outcomes

Increase cash flow

Improve collections rate

Lower agent costs and AHT in collecting debt

SERVIS**BOT**

MANAGING & ORCHESTRATING MULTIPLE BOTS

As a business matures in their approach to conversational AI and deploys a number of advanced bot solutions, a multi-bot architecture becomes highly relevant. At the heart of this architecture is a bot orchestrator. This is sometimes referred to as the Virtual Assistant or Conversation Manager and it enables a unified and consistent experience and a single point of conversation.

The concept of ServisBOT's multi-bot orchestration model is based on breaking a conversational experience into multiple skilled bots with defined missions. This is analogous to human resources in the workplace where subject matter experts have defined skills and roles. It is also representative of a microservices approach.

These skilled bots can be orchestrated by the bot orchestrator who navigates operations across the different skilled bots and routes to the appropriate bot or bots according to the intent.

Certain functions, such as language detection, translation, sentiment analysis, PHI/PII detection, and human escalation are centralized and accessible to all bots. These shared services are analogous to different business areas sharing common resources or services such as IT, HR, Finance, Administration and others.

SERVISBOT MULTI-BOT ORCHESTRATION MODEL
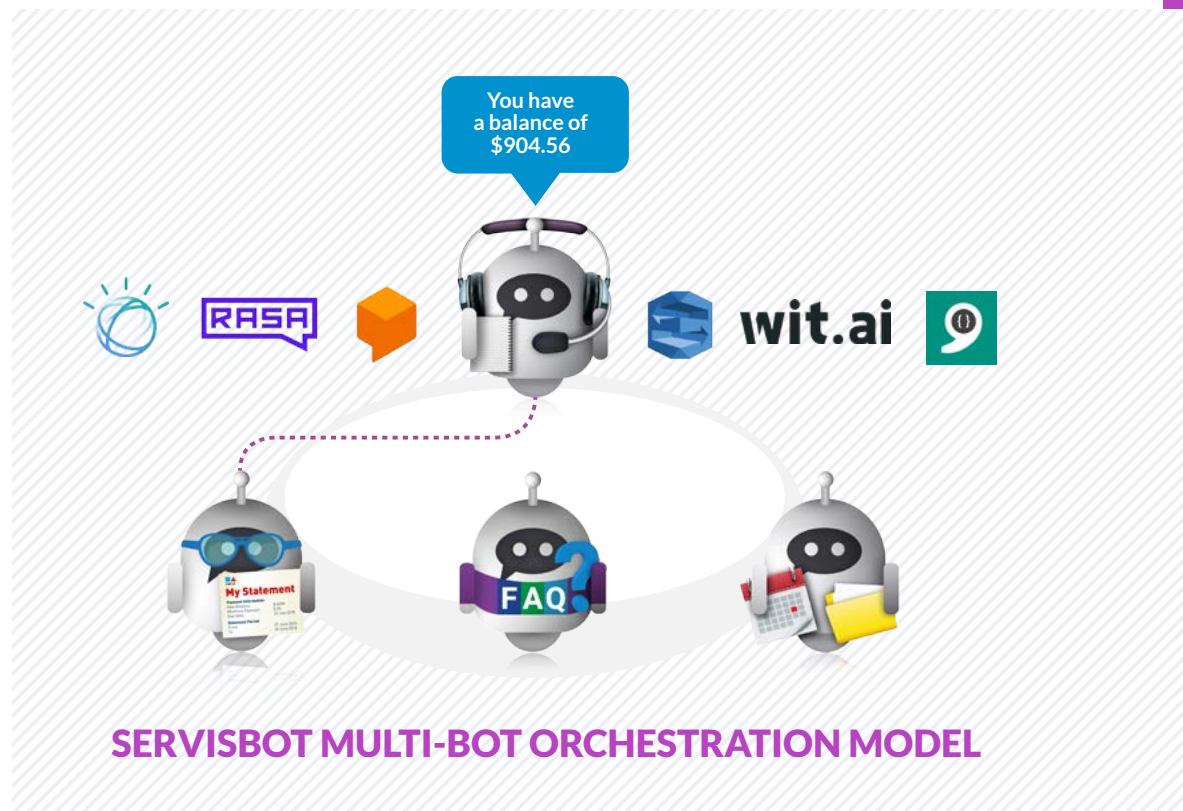
RELATED RESOURCES

For more information on Conversational AI solutions, our Enterprise Conversational Ai Platform, our Multi-bot Orchestration Architecture, our Case Studies and more please check out the following assets.

RELATED ARTICLES:

> **EBook: Guidebook for your Conversational AI Journey**

> **RFP Template: Crafting an RFP for Conversational AI Solutions**

> **Blog: Key Elements of an Enterprise Conversational AI Platform**

> **Article: When Conversational AI Grows From A Single Bot to Many Bots**

> **Case Studies: ServisBOT Client Success Stories**

USA
ServisBOT Inc.
P: +1 857 424 0978

IRELAND
ServisBOT Ltd.
P: +353 51 348417

askbotty@servisbot.com

ARE YOU BUILDING, MANAGING, AND GROWING YOUR CHATBOT SOLUTIONS ACROSS YOUR BUSINESS?

If so we can help you scale and manage your bots more affordably and more efficiently.

Contact us for more information or to schedule a demo of our Conversational AI Platform.

Follow us online

www.servisbot.com

SERVISBOT