IBM Watson Engagement Advisor
Agenda

- Introduction to IBM Watson Solutions
- Our vision for transforming engagement
- Getting started with the Early Customer Program
Businesses are “dying of thirst in an ocean of data”

- 90% of the world’s data was created in the last two years
- 80% of the world’s data today is unstructured
- 1 Trillion connected devices generate 2.5 quintillion bytes data / day

- 1 in 2 business leaders don’t have access to data they need
- 2.2X more likely that top performers use business analytics
- 23% premium over average customers in share of wallet, profit, revenue, and relationship for fully engaged customers

- 80% premium over average customers in share of wallet, profit, revenue, and relationship for fully engaged customers
IBM Watson combines transformational technologies

1. Understands natural language and human communication

2. Generates and evaluates evidence-based hypothesis

3. Adapts and learns from training and user selections & responses
Finding answers, not documents drives satisfaction and productivity

**Search**

- Individual has question
- Individual distills to 2-3 keywords
- Individual reads documents, finds answers
- Individual finds & analyzes evidence

**Technology finds documents containing keywords**

**Technology delivers documents based on popularity**

**Discovery**

- Individual asks question in plain English
- Individual receives actionable & fully transparent response

**Technology understands question in context**

**Technology produces possible responses & corresponding evidence**

**Technology analyzes evidence, computes confidence**

**Technology delivers response, evidence & associated confidence**
Brief history of IBM Watson

IBM Research Project (2006 – )

Jeopardy! Grand Challenge (Feb 2011)


Watson for Financial Services (Mar 2012 – )

Watson Industry Solutions (2012 – )

R&D

Demonstration

Commercialization

Expansion

Cross-industry Applications

New Division
Agenda

1. Introduction to IBM Watson Solutions
2. Our vision for transforming engagement
3. Getting started with the Early Customer Program
Evolving demographics are transforming customer expectations

10K
Baby boomers retire daily

6B
Mobile devices world-wide; 1B+ of them smartphones

2.5B
Active Facebook, Twitter, and YouTube accounts

84%
% top performers integrating analytics for better insights

“You don’t know me”
Intolerance of mass-market, impersonalized approaches

“It’s too hard”
Need the right information in the right place at the right time

“You’re not connecting with me”
Social / mobile replacing PC/web for quick, easy answers but 75% of self-service fails
Watson can help fundamentally transform the way people and companies interact over the lifetime of their relationship.

**Know me**
Leverage profile data for personalized insight into client wants and needs to contextualize experience.

**Engage me**
Dynamic, evidence-based omni-channel experiences that adapt to client preferences.

**Empower Me**
Interactive, informed natural language dialogue that enables insights at the point of action.
…and enable companies to grow share of wallet and loyalty by:

- Demonstrating an **uncanny understanding** of the customer in context
- Continuously **listens** to, and **learns** from customers
- Fostering **trust** and respects customer **privacy**
- Delivering personalized, trusted customer interactions **regardless of the channel**
- **Be persistent** and understanding how we have already interacted
- Empowering customers to **take action** in an intuitive, fast, accurate, and consistent fashion
Demonstration of driving value with Watson Engagement Advisor

The Watson Engagement Advisor enables an interactive user experience, responding to questions with weighted confidence, data transparency, and persistence across channels and time. It accomplishes this through active dialoging in natural language, putting content in context, leveraging big data, and systematically learning with new information, interactions, and outcomes.

- Transforming the customer experience
  - Reduce client turnover
  - Maintain existing client relationships
  - Build advocacy

- Growing top-line revenue
  - Engage the under-engaged
  - Personalize the experience
  - Omni-channel always-on environment

- Improving bottom line results
  - Increase first call resolution
  - Faster resolution through evidence based insights
  - Reduce operation costs by empowering agents and advancing self-service
Introduction to IBM Watson Solutions

Our vision for transforming engagement

Getting started with the Early Customer Program
The Early Customer Program is a shared journey toward transforming engagement

**Objectives**

**For You:** Be among the first to experience, influence and shape the use of cognitive technology (i.e. Watson) to transform the client experience

**For IBM:** Help evolve client best practices and perfect the Watson Client Engagement Advisor offering in collaboration with industry leaders

**Benefits**

- No financial charge
- Early access to game-changing technology
- Preliminary evaluation on use case, technology and data
- Access to IBM experts and resources
- Professional SaaS services
- Product input and guidance

**Commitments**

- Executive business sponsor
- Sample non-PII use case data
- Sample question and answers
- Access to subject matter experts
- Timely feedback on functionality
- Co-marketing participation
Early Customer Program helps qualify Watson’s value to participants

**Prequalification**

**Understand**
- Introduce WEA
- Explore business goal alignment and initial estimate of value creation
- Identify executive business sponsor

**Explore**
- Discuss questions to ask Watson, corresponding information sources, subject matter experts (SMEs), and target performance metrics

**Early Customer Program**

**Define**
- Evaluate and confirm customer compatibility with WEA
- Estimate effort to ingest data and train Watson

**Evaluate (with Watson)**
- Ingest sample data
- Evaluate using customer specific questions & answers
- Evaluate responses leveraging customer SMEs as required
- Repeat to improve accuracy and value

**Outcomes**

**Overview**
- Confirm business goal alignment, incremental value, and executive business sponsorship
- Ensure Non-disclosure agreement in place

**Outcomes**
- Sign Early Customer Program agreement
- Customer provides:
  - Question & answer list
  - Sample data
  - Performance metrics
- Start Early Customer Program for selected clients

**Outcomes**
- Produce Preliminary Assessment Report
- Confirm alignment to roadmap
- Schedule Watson Evaluation based on roadmap alignment and capacity

**Outcomes**
- Provide regular status updates on progress and get customer feedback
- Present Program Evaluation Report and demonstration
- Jointly evaluate output and potential for deployment
Co-Marketing focuses on your vision and expectations

Goals
- Highlight your industry leadership
- Outline a visionary position focused on commitment to customers
- Establish credibility in evaluating and embracing innovation for success

Approach
1. Set the stage – your business, customers, and values
2. Share your perspective – changes in the market, changing customer expectations
3. Paint the vision – your business transformation goals and objectives re: customer engagement
4. Identify the issues – what you hope Watson will address
5. Articulate the potential value – what benefits could be associated with addressing the issues

Multiple Channels and Vehicles
- Be associated with commitment to customer engagement and exploring potential benefits of Watson through logo/name
- State vision and expectations/hopes in quote
- Author blogs, feature in case studies, videos
- Meet with press and industry analysts
- Co-present at industry events
Next steps for discussion

1 Use Case
- Marketing
- Support
- Example: new smartphone, retirement plan

2 Data Corpus
- Knowledge bases / HTML
- PDF documents
- Unstructured data – text documents

3 Question & Answers
- Question types – factoid, descriptive, procedural, diagnostic, why, yes / no, definition, comment / scenario
- Examples of a Question & Answer
- Procedural Question: How do I share photos?

4 Performance
- Key performance metrics based on use case
- Accuracy of answers
- Capacity

5 Client Participation
- Business Sponsor
- Key Contact
- Subject Matter Experts
Thank You

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