



Put smart decisioning at the heart of AI strategy to help cultivate your OneOffice future

SEPTEMBER 2021

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Conversational artificial intelligence (AI) tools found a hot platform in the last 18 months as companies struggled to keep up with customer and employee expectations in a virtual environment with human resource constraints and remote working. The ability to generate more data-driven decisioning and automate intelligent interactions has been a critical advancement supporting this disruption, whether in the front office to improve customer experience or the workflows happening behind the scenes. Conversational AI can automate complex customer interactions and augment an agent's experience, empowering them to service the customer. It has become an integral part of executing HFS' OneOffice vision in Exhibit 1 by bringing together automation, people, process, and insights to deliver a balanced and aligned customer and employee experience.

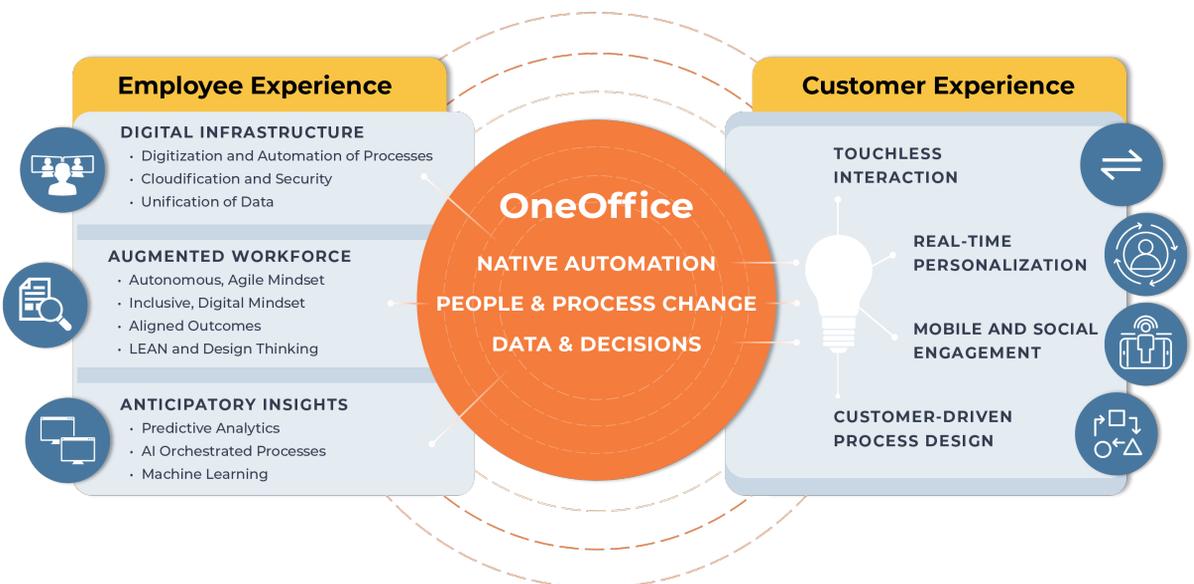
We spoke with several of [Q2 Hot Vendor XpertRule's](#) customers to understand through the lens of our OneOffice vision how they are using conversational AI and complex decisioning to impact their most essential business outcomes.

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OneOffice is the endgame, where the digital enterprise can work in real time to cater for its clients. It's where the intelligence, the processes, and the infrastructure can come together as one integrated unit, with one set of unified business outcomes tied to delighting customers.

— HFS Research

Exhibit 1

The Digital OneOffice vision leverages automation, people, process, and insights to deliver on shared EX and CX outcomes



Source: HFS Research, 2021

Since its inception in 2019, the foundational goal of HFS' OneOffice™ has been to break down the barriers between the front and back offices to create efficiencies and intelligence in alignment with common employee and customer outcomes. This OneOffice framework resonates with our enterprise network, with 99% of Global 2000 business leaders considering a OneOffice mindset as important or mission critical. The majority indicate this vision has only increased in the last 18 months since the pandemic began. Further driving home the importance of the OneOffice's core values is that employee experience (EX) and customer experience (CX) are tied in the top position as drivers in enterprise investment in technology and business services.

The front office must finally embrace intelligent automation to break down functional siloes

Before the pandemic hit, it was a struggle for enterprise leaders to look at customer experience from a holistic perspective. Contact center and customer service execs were accustomed to being treated as the lowest priority, sometimes taking a back seat to sexier, revenue-generating projects put forward by sales and marketing. Many CX leaders we speak to feel that their executives are sincerely supportive in theory but that getting the resources and proving their worth can be challenging. Robotic process automation (RPA) tools have helped increase efficiencies for contact center workers for many years, but adoption of AI, including conversational AI, remained low and often shielded by decidedly un-intelligent tools like FAQ-based chatbots parading as "conversational AI."

Exhibit 2

Stakeholder experience emerges as the most important driver for the deployment of technology and business services

What is the most important driver for deployment of third-party services?

Percentage of respondents



Source: HFS OneOffice Pulse Study, H1 2021
 Sample: 800 decision makers, Global 2000 Enterprises

With the pandemic's impact on customer service resources, the front office is finally ripe for adding the next level of capability by layering AI and intelligence to increase automation's value. With this burning platform established, companies must view AI in the front office as an investment providing context and understanding to conversations with the ability to reduce costs, improve experiences, and create new revenue streams.

Automation supporting agents is just as important as automation supporting customer interactions. Agents must be able to access the right information and receive expert guidance to deliver good CX, and automations help create efficiencies in their calls and post-call work. As such, the popularity of agent-assist-focused conversational AI has also increased in the past 18 months.

Voice of the customer: using decisioning with conversational AI to improve business outcomes

The goal of the sought-after and often nebulous "omnichannel" holy grail has been to enable conversations in any channel with a single source of truth and a 360-degree customer view, with both automated and human interactions enabled in the right time and place. As conversational AI evolves and improves, a key element of creating these omnichannel experiences is providing more sophisticated automated conversations, whether by

automating the conversation or empowering the agent to make better decisions and have deeper conversations. These platforms must also have easy access to back-end expertise so that automated tools can extract relevant information to assist the agent or execute queries and requests. To enable this, conversational "decisioning" is now at the core of what XpertRule's clients are leveraging its Viabl.ai platform for.

Viabl.ai is XpertRule's conversational AI and decisioning engine, powering conversations across channels. HFS spoke with a major mobile telecommunications firm using XpertRule's Viabl.ai platform to improve ticket resolution. This firm had the OneOffice EX-CX alignment in mind to improve the performance of its front-line tech support staff. Viabl.ai helps the tech support agent qualify and classify the customer request, answer technical questions about products, and investigate and fix technical issues. A part of this capability was an integration to trigger web services to access technical information about service and network equipment and provide expert conversational guidance for the agent to leverage in live conversations to resolve complex technical queries.

Implementing the Viabl.ai solution meant that instead of calling the customer back, the agent could solve the issue in real time with information at their fingertips, improving time-to-repair and first-call-resolution. It empowers every agent to deliver the support of the best agent. In tandem, this company also created a digital front end for customers to open tickets directly through the website, further digitalizing and improving the customer experience. Employee performance and customer satisfaction (NPS) have improved in tandem, with outcomes tightly aligned as we describe in our OneOffice framework.

The roots of automating complex decisioning paved the way for conversational decisioning

XpertRule's legacy and core competency have been all about enabling intelligent decisioning and complex customer interactions that spans front and back office. The Viable.ai platform is a relatively new development, leveraging the company's 20+ year history of developing algorithms and solving complex decisioning and customer interactions problems. HFS spoke to clients using the core decisioning and complex interactions capabilities of the XpertRule technology to understand what's really "under the hood" and the core capabilities that led to Viabl.ai's inception.

Another XpertRule client we spoke to is Arneg, a global commercial refrigeration manufacturer headquartered in Padua Italy, with 2,900 employees across 21 manufacturing plants and 18 international offices in 5 continents. The company designs and equips supermarkets with refrigeration systems, refrigerated cabinets, cold rooms, heavy duty furniture and checkout counters.

The challenges facing Arneg are that the layout and design of every supermarket is unique and requires a complete custom build. The size and specification of each cabinet must be individually configured and meet customer needs and local regulatory compliance standards which differ by country. As a result, getting a quote requires a detailed solution design. Arneg relied on a limited number of highly skilled solution engineers with deep product and design knowledge to produce a quote. Quotes were very time consuming and dependent upon the availability of these expert resources, resulting in higher Customer Acquisition Costs (CAC) and long sales cycles.

Arneg then faced the operational challenge of producing a bill of materials from the quote that could be inventoried and fulfilled by the ERP platform. Managing this process required a similar level of expertise — incurring further operational bottlenecks. Specification changes or configuration errors amplified this complexity. Arneg’s ability to execute and drive revenue growth was constrained by operational bandwidth. Finally, Arneg has a large number of distribution partners and sales agents across the world who were subject to the same quote generation and product configuration complexity challenges.

Arneg deployed the XpertRule Viabl platform to implement a solution named QUASAR (QUotation ASSistant for ARneg) to capture and automate the knowledge and decisions required to create a full design specification and produce a quote. This platform industrialized the entire quotation process without compromising on Arneg’s core differentiator to provide fully customized solutions. The solution utilized Viabl to develop complex web-based constraints/rules driven requirements capture forms and a rules based quotation generator.

Using Viabl’s extensible web-API connectors, Arneg were able to integrate QUASAR with the ERP platform to completely automated order entry processing of confirmed quotations. In 2009 Arneg extended the QUASAR system to the partner distribution network, enabling their sales engineers to configure solutions and produce quotes using exactly the same mechanism as internal resources. The distribution network immediately fed back that the availability of the platform had radically improved the ease of doing business with Arneg.

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Implementing the XpertRule configurator was a way to capture the knowledge from the minds of our power users. It turned this individual wealth of knowledge into company wealth. We now can leverage what in the past was only in the minds of a few people

— **Claudio Canepa, C.I.O.**
ARNEG Group

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— The Bottom Line: Intelligent decisioning is becoming an increasingly critical part of executing an AI strategy. Embrace it now as a core tenet of your OneOffice journey

Conversational AI is a crowded and sometimes mystifying space, where every vendor and provider claims a greater and differentiated capability. Natural language processing (NLP) capabilities are barely differentiated in today's market, and features and functionality matter less than the abilities to integrate quickly and flexibly and connect to back-office systems where valuable customer information sits. The key capability, therefore, must be conversational AI tools in the hands of business users that can develop use cases enabling greater ease for customer service agents to deliver on great customer experience. Also, it must be able to use the data within these valuable interactions to generate insights (the contact center is a treasure

trove of under-utilized information). Combining the power of data and decisioning to enable deeper conversations across channels is delivering XpertRule's customers the greatest success.

Finally, change management must be front-and-center for any successful implementation of any AI platform. The clients we spoke with emphasized the positive cultural changes, internal buy-in, and true enthusiasm for using new tools; when people see the tools working well and their performance improving, it's a win-win scenario. Enterprises seek this kind of aligned employee and customer experience to generate value and ultimately stay competitive and financially successful.

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Melissa O'Brien leads HFS' customer experience and front office services research, with a specialization in retail and travel and hospitality strategies. Her key focus areas are on customer engagement operations, CX design, digital marketing, and digital associates, focusing on the trends that are driving customer experience across the enterprise.



About HFS Research: Insight, Inspiration, Impact

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as "RPA" (Robotic Process Automation) in 2012 and more recently, the HFS OneOffice™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation, Artificial Intelligence, Blockchain, Internet of Things, Digital Business Models and Smart Analytics.

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