

Figure 9: Customer-Facing CAI

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|--|---|--|---|---|
| What customer self-service activities are supported by your solution in each channel? | | | | |
| <p>Any information and transactional self-service activities can be configured with Cognigy.AI and deployed across channels.</p> <p>Identification and verification (ID&V) and know your customer (KYC) across multiple industries.</p> <p>Managing appointments, payments, and account details.</p> <p>Handling refunds, returns, and rebooking.</p> <p>Providing support for various product and service inquiries.</p> <p>Addressing specific industry needs like baggage issues, health education, shopping assistance, meter reading, financial transactions, and more.</p> | <p>Numerous customer self-service activities are supported across channels and verticals, including account information and balance, FAQ, account/card activation, payment processing, appointment scheduling and reminders, utility service outages, payment processing, payment reminder, payment inquiry, quoting/pricing, order status/tracking, claim submission, sales promotions, sales follow-up, customer feedback, and surveys.</p> | <p>The XO platform enhances customer self-service across various channels, including web and mobile applications, messaging platforms, voice channels, email, SMS, and social media.</p> <p>It supports activities like automated inquiry responses, product information, account management, and service requests through chatbots and virtual assistants. In web and mobile applications, it integrates with knowledge bases, allowing customers to find answers.</p> <p>On messaging platforms such as Facebook Messenger, WhatsApp, and Slack, it provides proactive notifications, alerts, and interactive support. Voice channels are enhanced with voice assistants and AI-driven IVR systems, offering natural language conversations and secure voice biometrics.</p> <p>Email automation handles common queries, categorizes emails, and routes complex issues, while SMS bots facilitate interactions and send reminders.</p> | <p>In the CAI solution, all customer self-service activities can be performed once authentication is completed. After implementing methods including voice biometrics or OTP, self-service can be provided.</p> <p>Some examples of channels with self-service activities include:</p> <p>WebChat: Offers real-time assistance on websites and handles a variety of customer service activities including troubleshooting, account management, and Live Agent support.</p> <p>Mobile: Similar functionalities as the web channel, with additional support for push notifications and in-app messaging.</p> <p>Avatar: Engages with virtual avatars for customer service, provides product information, and handles common queries.</p> <p>Social media: Responds to common queries, provides links to resources, and handles basic customer service issues through platforms like Facebook, WhatsApp, Teams, and Slack.</p> | <p>Verint IVA does not limit customer self-service activities by channel. The one platform can be used to service all of an organization’s channels. The solution is only limited by the technical constraints (in essence, API capability) and the client’s business rules and practices regarding the functionality that can be offered.</p> <p>In a practical sense, Verint IVA is used to carry out a wide array of self-service functions: ID and verification, password resets, new bookings and sales, receipt requests, order modification and cancellation, FAQs, job logging, system resets, and appointment booking across voice, chat, and social channels.</p> |

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| | | <p>On social media platforms like Twitter and Instagram, social media bots monitor mentions, respond to messages, and engage with customers.</p> | <p>SMS: Quick responses to frequently asked questions, appointment scheduling, and order status updates.</p> <p>IVR: Interactive voice response systems can be used for account information, payment processing, and appointment scheduling.</p> | |
| <p>Please describe what the CAI solution does when it doesn't know how to handle a customer request or doesn't understand customer input.</p> | | | | |
| <p>Multiple approaches can be taken when the user input is not understood:</p> <ul style="list-style-type: none"> • Disambiguation: When intents are unclear or closely matched, Cognigy.AI prompts users with disambiguation sentences to clarify their needs. • Reprompt: Utilizes reprompting strategies to handle unrecognized inputs. • Agent escalation: The conversation is handed over to a human agent. | <p>As the central point of automation orchestration, SmartFlows manages the AI workflows, communications, and channel and controls the overall customer experience. When the AI Workflow or supporting components don't know how to handle the customer request or don't understand the customer input after several attempts as defined for the use case, SmartFlows will take the necessary escalation steps; for example, it can route the interaction to a live human to continue the experience.</p> | <p>In cases where the CAI solution fails to understand customer requests, it tries to proactively ask a few questions to seek clarity and understand user intent.</p> <p>If the request still cannot be handled by the bot, it transfers the interaction to a live agent. The platform selects the appropriate escalation path to transfer the conversation to support agents. The agent transfer node, which facilitates this transition, acts as a relay service between the user message and agent response, until the agent signals the close of the conversation.</p> | <p>When the CAI solution doesn't understand the input or encounters an ambiguity, it asks the customer for more information or to rephrase their query. If the request is still not clear, it matches the fallback intent and provides a generic response indicating it couldn't process the request and suggests alternative actions, such as visiting the help center or speaking to a live agent.</p> <p>For out-of-domain queries, the solution can use generative AI to provide a more comprehensive response.</p> | <p>The Conversational Flow UI of Verint IVA allows the designer to determine how to handle the interaction: repeating the question, asking the customer to restate their query, passing the query through a KM environment, through to escalating to an agent. Most commonly, a fallback system using RAG or content search (or both) are leveraged to supplement the self-service flows that an IVA is designed for with coverage of information that can be useful as a part of the flows.</p> |

Source: DMG Consulting LLC, July 2024