martedì 16 Aprile 2024

Valore dei KPI nell'era AI

2024 Itinerari live e on-line CMMC
Incontri presso le Aziende del Club CMMC

tappa di Milano
in collaborazione con

bip.

Benvenuti!

Programma

ore 10,00 **- welcome coffee**

ore 10,30 **- Apertura incontro -** Mario Massone, Club CMMC
- Presentazione BIP - Roberto Perduca e Nicola Cois, BIP
- Presentazioni dei Partecipanti all'incontro

Premesse
- Le applicazioni di AI nel Customer Management e possibili benefici *(cenni)*
- La pervasività dell'AI in azienda *(cenni)*
- I risultati del sondaggio "Effetti GenAI" realizzato da CMMC

ore 11,30 - **Attività dei Partecipanti su tre gruppi di lavoro coordinati**
ore 12.00 - **Presentazione attività dei gruppi e discussione** *(*)*
ore 13.00 - **Light lunch e networking**
ore 14,00 - **Le esperienze di BIP: casi applicati di AI Generativa**
ore 14,45 - **Conclusione incontro**

(*) Collegamento aperto in Teams

BIP

Company Profile & Customer Operations

April 2024

HERE TO DARE

Agenda

1. BIP company profile

2. Customer Operations

bıp.

Founded in 2003, BIP now employs over 5000 professionals, providing management consulting services and Business Integration to support companies in the exploration and adoption of technological innovation.

We offer our professional services to a continually growing number of international clients. Strong relationships with local stakeholders and targeted acquisitions have allowed us to expand our networks and establish ourselves as trusted consultants in key markets.

2003
Foundation

13
Countries

+5000
Professionals

bıp.

bɪp.

Our offices

Italy

Milano
Roma
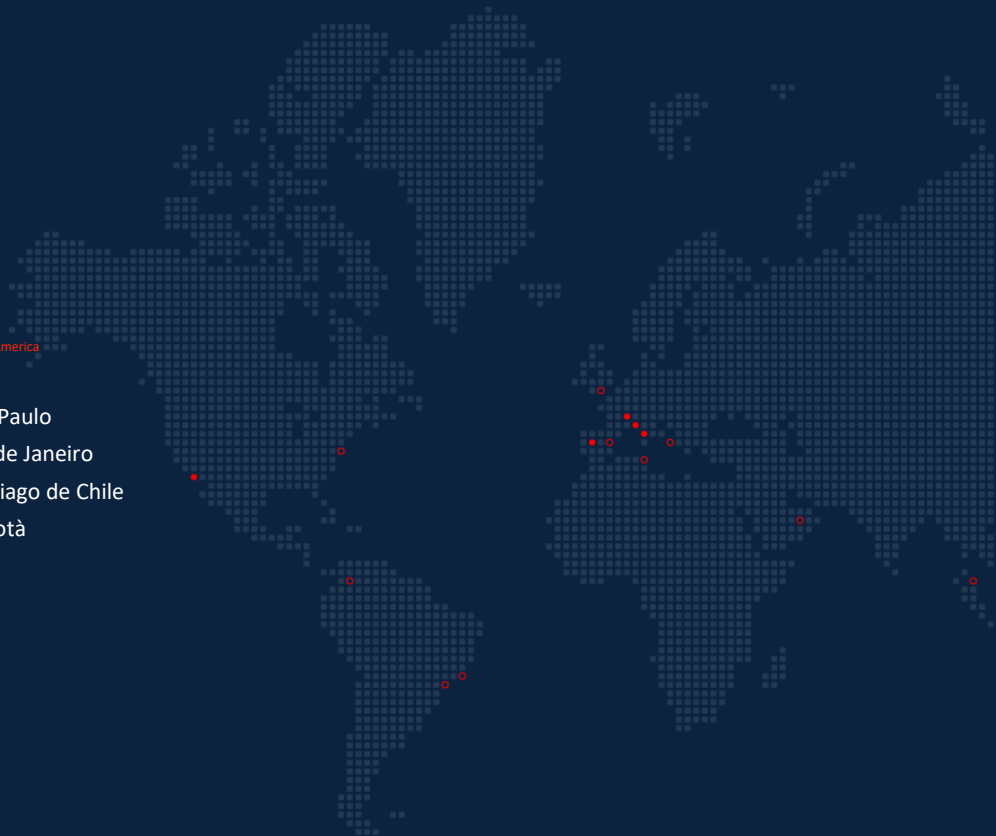Mogliano Veneto
Bologna
Palermo
Padova

EMEA

London
Madrid
Barcellona
Bruxelles
Lugano
Wien
Zurich
Instanbul
Abu Dhabi
Lisbon
Munich

North America
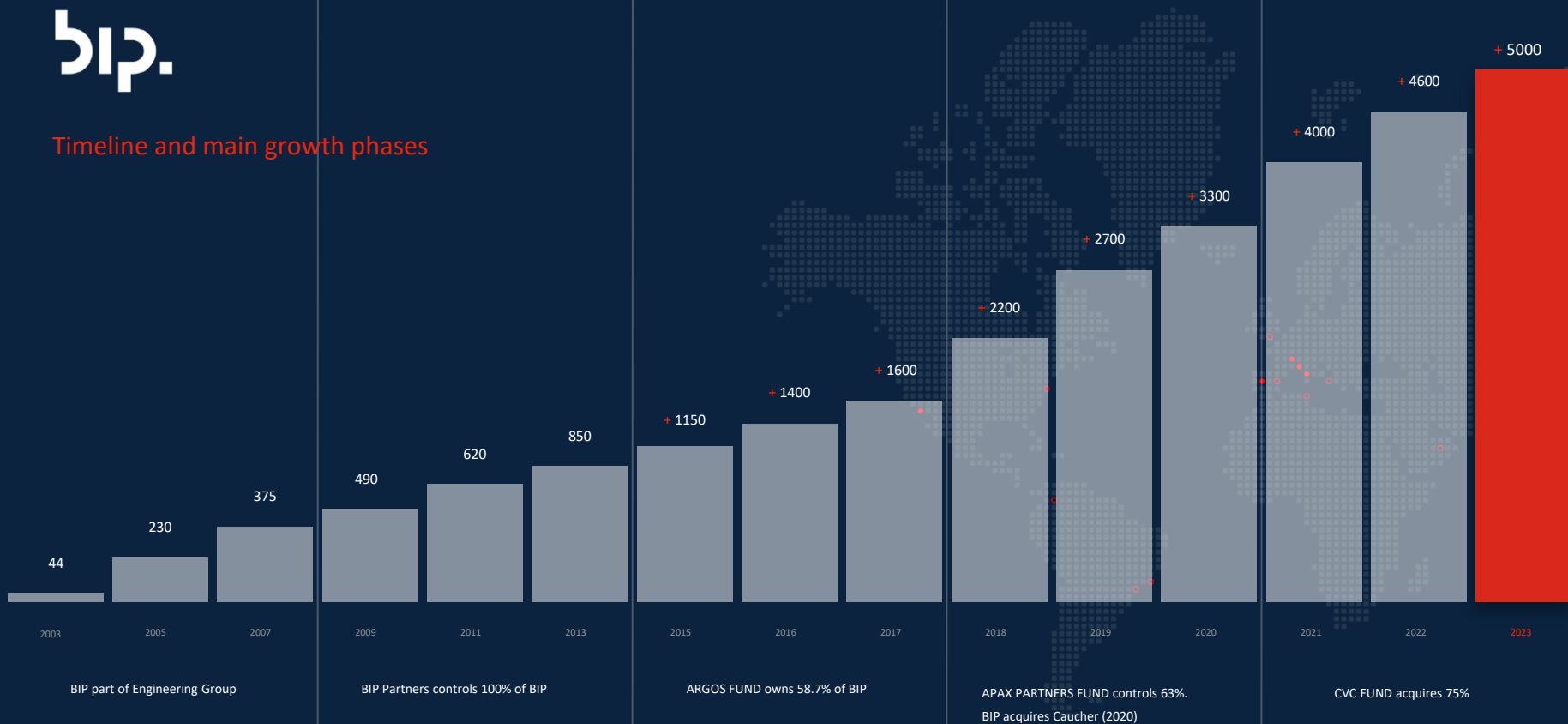
New York
Houston
San Francisco
Chicago
Boston

South America

São Paulo
Rio de Janeiro
Santiago de Chile
Bogotà

bɪp.

bip.

Timeline and main growth phases

Year	Value
2003	44
2005	230
2007	375
2009	490
2011	620
2013	850
2015	+ 1150
2016	+ 1400
2017	+ 1600
2018	+ 2200
2019	+ 2700
2020	+ 3300
2021	+ 4000
2022	+ 4600
2023	+ 5000

BIP part of Engineering Group

BIP Partners controls 100% of BIP

ARGOS FUND owns 58.7% of BIP

APAX PARTNERS FUND controls 63%.
BIP acquires Caucher (2020)

CVC FUND acquires 75%

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1

Free and neutral

Not system integrator, nor auditor. We do not sell technologies.

We focus on consultancy without obligations, looking for the best solution for our clients.

2

Trust relationships

Thanks to a strong experience we build and maintain relationship with our clients based on a full comprehension of strategical and operational needs and a deep understanding of changes within different industries.

3

Pragmatism and efficacy

Our main approach is "Make It Happen", also when we deal complex transformation programs.

We support in a pragmatical way our clients throughout all project phases, from initial design to the deployment of new solutions.

4

Tailor-made

Our professionals join traditional competencies with innovative skills to help clients to catch new opportunities and face more complex challenges, providing solutions customized that enhance the value of their organization.

bip.

bip.

Our cross-industries practices

01

*e*lements

We design and deliver comprehensive strategies to engage fans, convert them into loyal customers, and increase customer lifetime value, all while harnessing the full potential of cutting-edge technologies.

02

Native Strategy

We bundle the strategic expertise required to develop new business models, products, services and proposition and take them to market. We accelerate growth bringing together all components of value creation like Exponential Organization Design, strategic planning, M&A, brand and marketing strategy.

03

xTech

Excellence in AI, big data, cloud and exponential technologies to power end-to-end digital solutions, supporting data-driven transformation and scaling up responsiveness to business evolution. xTech is the largest Data Scientist Community in Italy and within TOP 5 in Europe.

04

BIP Red

We create something from nothing. Our teams of innovators, designers, change managers, producers, marketers and developers help large companies move from an ambition to a defined product and service and bring it to market. We do it together because things only happen when you put all the right people behind them.

05

E-business Performance Optimization

aims to support customers in optimizing their digital channels, from the e-commerce platform (with CRO activities, e-com strategy and high-margin sales models) to the management of digital advertising media channels (SEM, social, display and the whole performance marketing world).

30+ Professionals

100+ Professionals

500+ Professionals

THE VISUAL AGENCY

400+ Professionals

sketchin

openknowledge

VIDIEMME

BIT BULL

30+ Professionals

bip.

bip.

Our cross-industries practices

06

TS2

We are a team of professionals specialized in supporting our clients in developing and delivering robust strategies on their IT infrastructure transformation initiatives and in streamlining the IT processes to achieve operational excellence. We follow a structured approach aligned with recognized framework and best practices (e.g. ITIL, FinOps) properly tailored to meet client needs.

40+ Professionals

07

Cybersec

The challenge posed by today's cyber threats concerns every sector in every country. This is why our cyber security team brings together professionals from various fields – from law to economics, from consulting to national security – and integrates them into an international defence system.

250+ Professionals

08

Customer Operations Services

offer services aimed at improving quality of multichannel assistance offered to customers and making its internal delivery more efficient in terms of processes, resources and technologies. We define a coherent Service Promise and Service Model, design and implement an Operating Model, evaluate and suggest a Sourcing Strategy, survey and recommend Tools and technological architectures/platforms.

30+ Professionals

09

Platform Architecture Strategy

is a team of Platform Strategists helping Clients to drive the evolution of Enterprise Architectures toward fully interoperable and adaptative technological platforms. We act as a bridge between business and technology departments delivering a wide set of services to manage the full lifecycle of an Enterprise Architecture (EA).

20+ Professionals

10

Sustainability

aims to support customers in optimizing their digital channels, from the e-commerce platform (with CRO activities, e-com strategy and high-margin sales models) to the management of digital advertising media channels (SEM, social, display and the whole performance marketing world).

30+ Professionals

bip.

Our cross-industries practices

11

CFO services

We support the Finance transformation from the design of the strategy to its implementation in daily operations.

50+ Professionals

12

Internal Control System

The activities encompass assessment, designing and setting up Internal Control Systems (ICS), executing controls, reporting results, and providing audit support and monitoring throughout the entire process.

30+ Professionals

13

CTO / CIO Services

Our teams excels in those activities which aim to define priorities and seek new growth opportunities
(e.g. Technology Strategy & Governance, Data Centre & Cloud, Architecture, Vendor Management, etc.).

300+ Professionals

14

Human capital

Center of excellence that inspires, generates and implements change in People and Organizations. We design personalized training programs by acting simultaneously on four pillars (skills, behaviors, tools, organization).

50+ Professionals

15

Complexity & Collaboration Officina

we design and facilitate collaborative sessions to solve our clients' challenges. we manage big events with the perfect mix between communication and interaction with the participants. we customize any content through drawings and animations to communicate in an empathic, concrete, and unique way.

6k unique partecipants in one year

bip.

Energy & Utilities

e·on · eni · ERG · bp
snam · a2a · acea
iren · VERITAS · enel
REPSOL · HERA · REPOWER

Retail, e-commerce & Consumer goods

ESSELUNGA · Barilla · LUXOTTICA
Media Markt · LEROY MERLIN · Heineken
PAUL & SHARK yachting · UNITED COLORS OF BENETTON · YOOX
Kraft Heinz · Bata · unieuro

Technology, Telco, Media & Entertainment

FASTWEB · Vodafone · deltatre · sky
WIND 3 · RCS Sport · Telefónica · ERICSSON
htc · BT · CHILI · SAMSUNG
Inter · GEDI GRUPPO EDITORIALE · amdocs · PlayStation · LG
Google · SONY · Lenovo · TIM

Automotive & Transportation

PIRELLI · PORSCHE · LEXUS · TOYOTA
VOLVO · Volkswagen · LAMBORGHINI · BMW
FIAT Alfa Romeo Lancia · Ferrari · CNH · enjoy

Luxury and fashion

TOD'S · KERING · Zegna
SAINT LAURENT · LVMH · Salvatore Ferragamo
GUCCI · BVLGARI · HERNO
MARCHON · CORNELIANI

Financial Services

conio · AON · Allianz
GENERALI · UniCredit · BNP PARIBAS
AXA · ING · Deutsche Bank
CRÉDIT AGRICOLE · VISA · BARCLAYS

Life Science

AstraZeneca · mentadent · Pfizer
Boehringer Ingelheim · D · Schering-Plough
Amersham Health · BAYER · AMGEN

Public sector

Posteitaliane · MEF Ministero dell'Economia e delle Finanze
sogei · Alitalia · TRENITALIA GRUPPO FERROVIE DELLO STATO
pagoPA · anas · AGID
FINCANTIERI · Comune di Milano

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Agenda

1. BIP company profile
2. Customer Operations

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The new model of Customer Operations

Interactions and connections between different BUs are crucial for COps success

Acquisition / Sales

Delivery / Activation

CVM

Post Sales

Re-Evaluation

Key Elements

Customer Experiences

Value Management

Omni Channel

Frequency in Customer Interactions

Business Units

Loyalty Program

Contact Center

Logistics

Back Office

Sales

Service & Delivery / Fulfillment

Warehouse

Training

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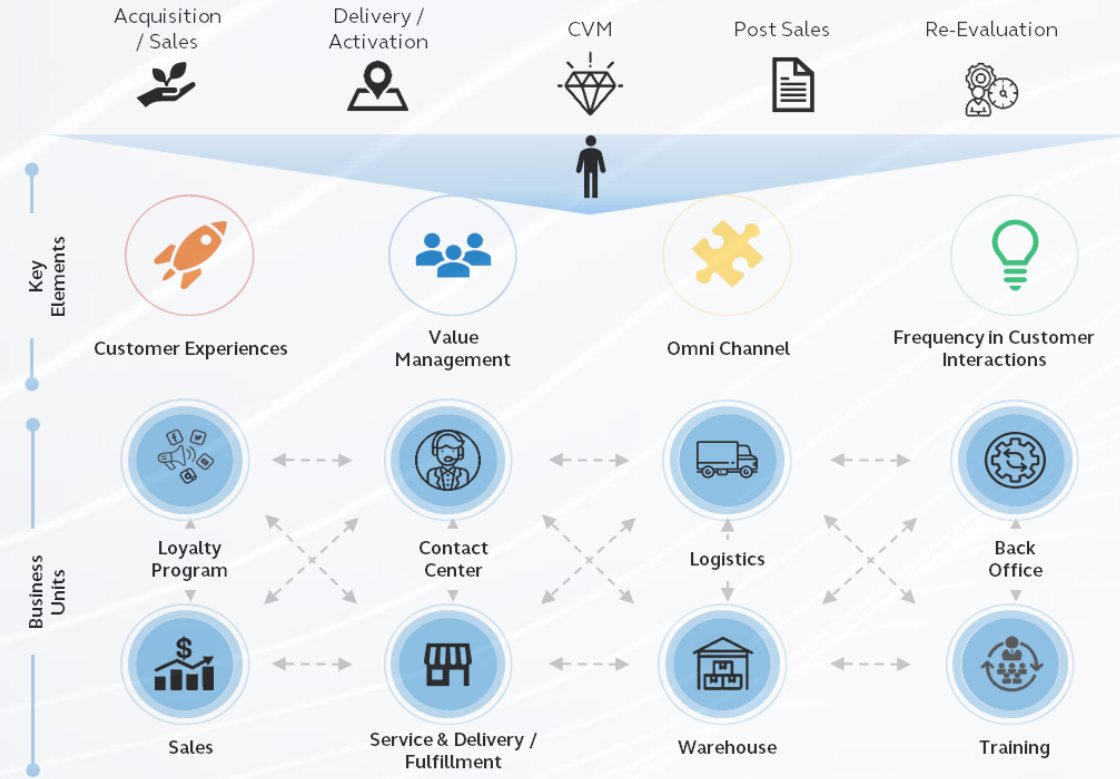
Service Customer Operation framework

The pillars for a successful interaction with customers

The framework is composed by 5 key areas of interventions, with support from other Centers of Excellence that guarantee support focused on the specific subjects, with background and long-term experience accumulated on related projects.
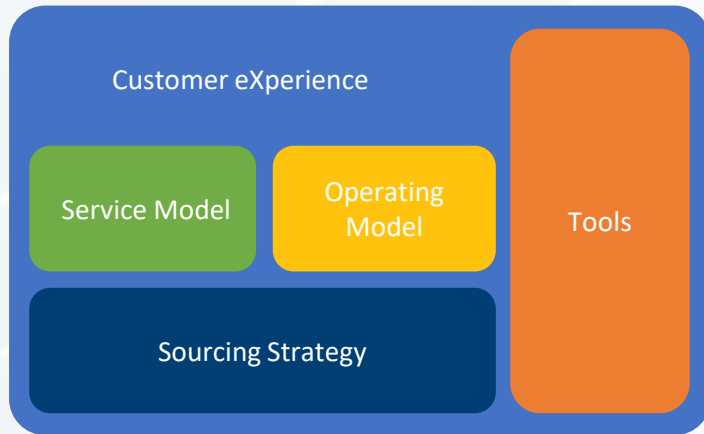
Ensure a customer centric view in the design, implementation and orchestration phases of the **E2E experience** through an approach built on the needs and possibilities of the organization.

✳ sketchin

#ExploratoryResearch #EcosystemMap #CustomerJourneyMap #Service Blueprint #Voice of Customer #NPS

Strategic support in **Service Promise** definition and service models creation to maximize customers satisfaction while remaining economically sustainable

#servicepromise #benchmarking #digitalization #channelmix #businesscase

Operating model implementation through design, creation and improvement of **processes**, procedures and capabilities

#activities #processes #capabilities #skills #KPI #specialization #knowledge

Provide tools to improve processes **effectiveness and efficiency**, from the needs' assessment to solutions design

▽IDIEMME   XTECH   CYBERSEC

#CRM #CTI #routing #KM #AI #performance #analytics

Provide strategic evaluations and suggestions in make or buy decisions, analyzing the reference market and comparing various **potential suppliers** and partners performances

#selection #benchmarking #RFx #performance #suppliers #outsourcing

Customer eXperience

Service Model

Operating Model

Tools

Sourcing Strategy

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Quals overview

A selection of the main clients

Different projects have been delivered into various industries bringing value to clients into all the areas of the framework of services.
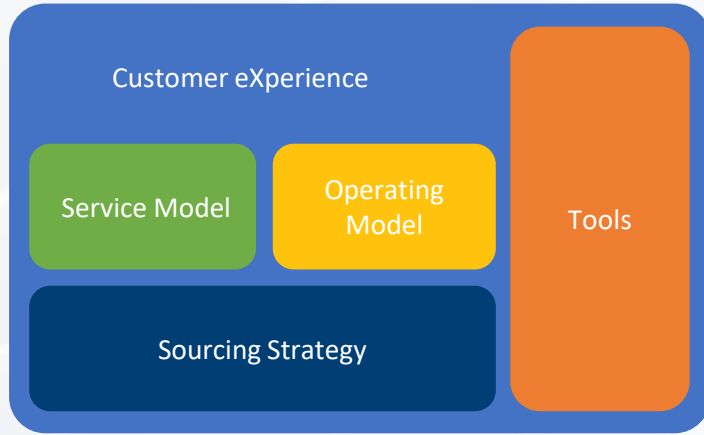
Contacts

Roberto Perduca

Partner

roberto.perduca@bip-group.com
mobile +39 342 941 3778

Nicola Cois

Manager

nicola.cois@bip-group.com
mobile +39 342 070 7540

Business Integration Partners S.p.A.
Piazza San Babila 5
20122 Milano
www.bipconsulting.com

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Presentazioni dei partecipanti

Premesse

Applicazioni, benefici e nuove attività possibili con l'AI Fonte: CX & CJ Design

- <u>Velocizzare i tempi di risposta</u>: L'AI può analizzare rapidamente richieste e domande dei clienti, ed anche quanto da loro detto fedelmente, consentendo risposte immediate e/o indirizzandoli verso le risorse adeguate.
- <u>Risolvere automaticamente domande frequenti</u>: Chatbot basati su AI possono gestire richieste comuni, liberando gli operatori umani per compiti più complessi.
- <u>Personalizzazione delle interazioni</u>: L'AI può analizzare i dati storici dei clienti per offrire esperienze personalizzate, come suggerire prodotti o servizi più adatti rispetto allo storico delle esigenze dei clienti.
- <u>Sentiment Analysis</u>: Monitorare il feedback dei clienti tramite analisi del sentiment permette di identificare problemi e migliorare la CX.
- <u>Automazione dei processi interni</u>: L'AI può automatizzare attività ripetitive, come la gestione delle richieste di rimborso o la pianificazione degli appuntamenti.
- <u>Analisi predittiva</u>. Esaminando vendite, dati dei clienti e attività sul sito web, l'AI può raccomandare prodotti, offrire sconti e individuare clienti che si rischiano di perdere; prevedere le esigenze dei clienti e anticipare problemi può migliorare la CX.
- <u>Chatbot avanzati</u>: Oltre alle risposte standard, questi chatbot possono utilizzare l'AI per comprendere contesti complessi e rispondere in modo più naturale.
- <u>Riconoscimento vocale</u>: L'AI può convertire il parlato in testo, consentendo interazioni vocali con i clienti tramite chat o assistenti vocali.
- <u>Generazione automatica di contenuti</u>: L'AI può creare risposte personalizzate o contenuti come e-mail di follow-up o newsletter.
- <u>Assistenza virtuale</u>: Agenti virtuali guidati dall'AI possono rispondere alle domande dei clienti in tempo reale.

Impatto su diverse funzioni aziendali: alcuni esempi Fonte: CX & CJ Design

- ❖ <u>Gestione automatizzata delle richieste</u>: L'AI può essere utilizzata per smistare e gestire le richieste dei clienti in modo efficiente, coinvolgendo diverse funzioni aziendali come il Customer service, le Vendite, il Marketing e la Logistica.
- ❖ <u>Marketing</u>: L'AI può segmentare i clienti, personalizzare le campagne e ottimizzare le strategie di marketing.
- ❖ <u>Vendite</u>: L'AI può aiutare a identificare lead qualificati e suggerire azioni per migliorare le conversioni.
- ❖ <u>Gestione delle Risorse Umane</u>: L'AI può semplificare la selezione del personale, migliorare la formazione e monitorare l'engagement dei dipendenti.
- ❖ <u>Logistica e Supply Chain</u>: L'AI può ottimizzare la gestione delle scorte e migliorare la consegna dei prodotti.
- ❖ <u>Finanza</u>: L'AI può automatizzare processi contabili e rilevare frodi.

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Valore dei KPI nell'era AI

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KPI collegati alla GenAI – Risultati sondaggio CMMC

1) **KPI di tipo finanziario**, comprendono ROI, marginalità, produttività, effetto di efficienza nei processi interessati;

2) **KPI di contenimento**, che includono la riduzione di costi (saving) o la call deflection;

3) **KPI di miglioramento**, che comprendono un aumento del fatturato, dei contatti, dei tassi di conversione lead;

4) **KPI di CX**, ovvero effetti sull'esperienza del cliente o la soddisfazione dell'utilizzatore, es. con la personalizzazione del servizio.

Quale tra queste tipologie di KPI pensi sia più idonea per misurare l'innovazione indotta da una soluzione di IA Generativa nel Customer Management?

	%
KPI di CX Customer Experience	42
KPI di contenimento (es. meno costi)	23
KPI di miglioramento (es. più contatti)	19
KPI finanziari (es. ROI)	16
	100

sondaggio CMMC su LinkedIn e Telegram (marzo '24)

Attività di gruppo

Attività di gruppo

Premessa: **non siamo alla ricerca di nuovi KPI**. Tuttavia, servono strumenti per **risolvere le esperienze più problematiche e impreviste**.

Tra i possibili indicatori si ricordano:

- **KPI intermedi** (da usare durante le fasi di implementazione)
- **KPI di dettaglio** *(Precisione, Recall, Accuratezza, Tempo di risposta, Risoluzione primo contatto, Tasso di abbandono, Soddisfazione utente, Copertura intenzioni)*

COMPITO. Assegnate/consigliate una o due applicazioni di AI a ciascun gruppo. Scelta di un paio di KPI, come strumenti opportuni a misurare le nuove soluzioni di AI, descrizioni, relative motivazioni, benefici attesi.

GRUPPI DI LAVORO e applicazioni AI suggerite:

- **a) Customer Service:** Chatbot evoluti - AV con comprensione contesto e naturale
- **b) Customer Experience:** Analisi predittive - Personalizzazione interazione
- **c) Tools & Technology:** Generazione di contenuti - Automazione processi.

Ciascuno porterà considerazioni da tre punti di vista:

- ❑ … delle **Operation**, per il gruppo a)
- ❑ … del **Marketing**, per il gruppo b)
- ❑ … dell'**IT** per il gruppo c)

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Valore dei KPI nell'era AI

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Composizione gruppi

- a) Customer Service
(coordinatore Nicola Cois)

Camilla	**NALIN**
Patrizia	**COMPAGNONE**
Chiara	**PAZZAGLIA**
Nicola	**DI LERNIA**
Carlo	**PARNIGOTTO**
Anna Maria	**VILLA**
Vincenzo	**DALLARA**
Gian Luca	**GALLO**

- b) Customer Experience
(coordinatore Mario Massone)

Martina	**RADICE**
Stefano	**MORONI**
Francesca	**VALLE**
Paolo	**BONOMI**
Cristina	**BURGHELEA**
Luana	**BENI**
Mauro	**BATTAGLIA**
Gabriele	**TRIDICO**

- c) Tools & Technology
(coordinatore Roberto Perduca)

Gianluca	**GEMMA**
Alessandro	**FOSSATI**
Ewa	**LUSZPIANKO**
Gabriele	**GUIDA**
Massimo	**CAGIANELLI**
Dario	**RATAZZI**
Francesco	**SCHETTINO**
Cristina Micaela	**SANGIORGI**

assenti

Discussione output dei tavoli

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Light lunch e networking

Le esperienze di BIP:
casi applicati di AI Generativa

martedì 16 Aprile 2024

Valore dei KPI nell'era AI

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Context & Objectives

A telco company is exploring the opportunities deriving from the **adoption of Generative AI** in different business areas to optimize internal processes and to offer the customer an enriched, more fluid, and customized experience.

The company has identified a **first use case** on the **internal IT Service Desk**: implementation of a conversational agent to support the employees in accessing and explaining the company internal processes and procedures.

The goal is to demonstrate **the capabilities of Generative AI to implement the "IT Service Desk" use case,** providing business proof-of-value of this technology, as well as architectural templates and guidelines for further use cases.

Scope of the MVP

F **Features and capabilities**

1 Direct support through a Conversational Agent

The user can interact with the IT Service Desk by texting with a chatbot that provides suggestions and instructions extracted from the Internal Knowledge Base. Each answer contains references to the documentation.

2 Ticket routing to Remedy

The Conversation Agent establishes whether provide direct support by itself or escalate the ticket request to a human agent.

In the latter case, the Conversational Agent enriches the ticket with further information gathered from the Internal Knowledge Base and opens a new ticket in Remedy.

R **Requirements**

Only English tickets/requests are in the MVP scope

PDF guidelines, tutorials, and policies contained in IT Service Desk SharePoint and website

Users can access the IT Service Desk chatbot through a Teams Integration (preferred) or the Service Desk website.
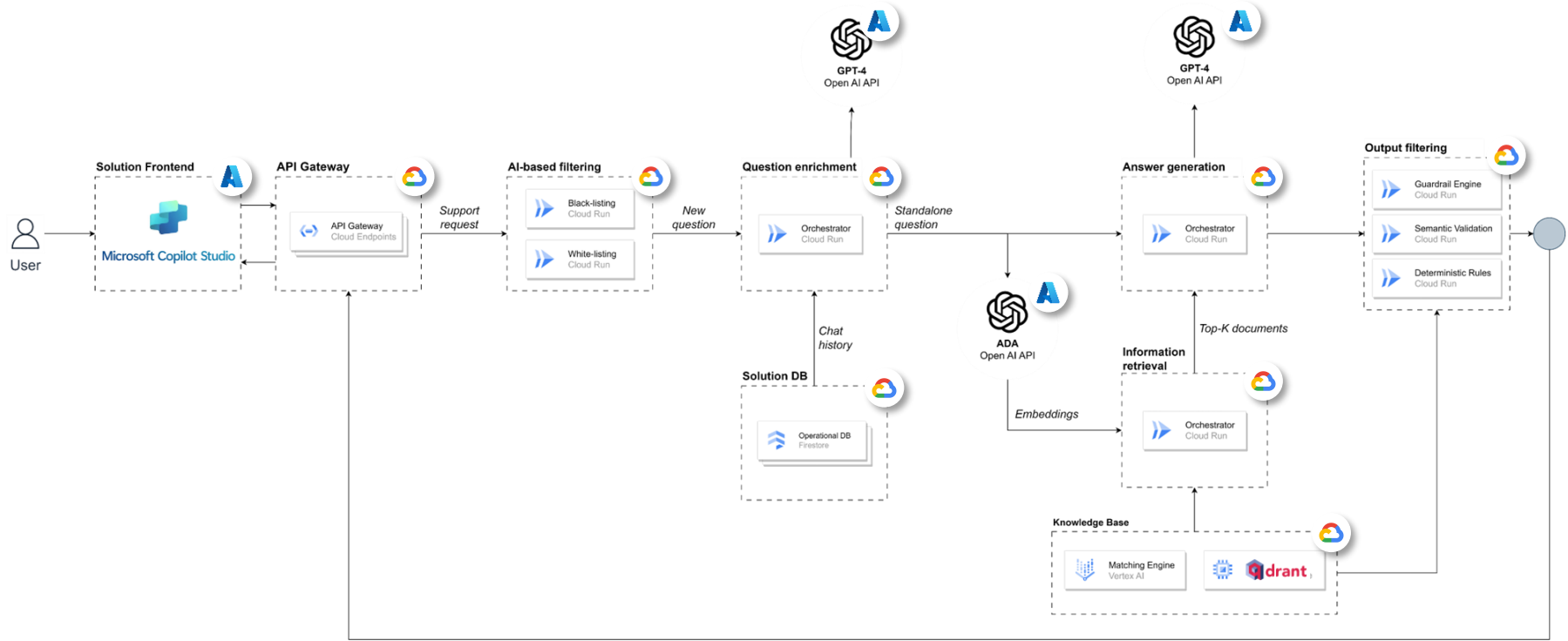* The feasibility must be verified.

Documentation (or direct support) to integrate Remedy/Easy with the solution

High-level solution schema

The solution aims to guide the employees through IT Service Desk internal resources, such as procedures and processes documentation, engaging them with a conversational agent in order to ease access to information, routing questions to the right procedures, and summarizing instructions.

Conversations through a dedicated MS Teams channel. Conversational Agent Answers include text, and links to resources.
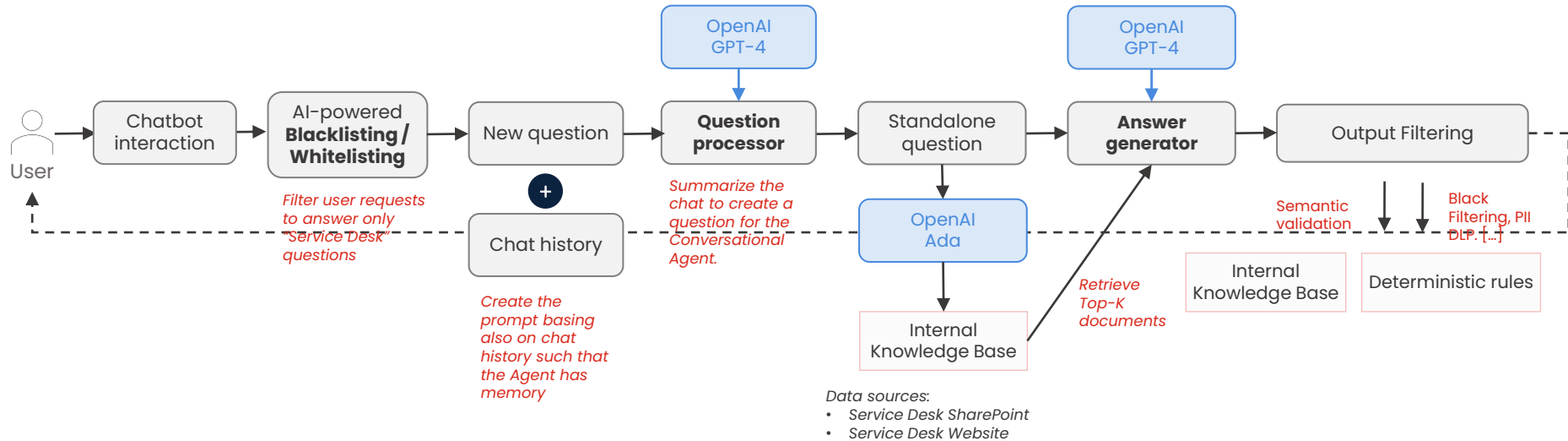
Architectural solution schema based on GCP and Azure

Project Approach

ASSESSMENT & DESIGN | CLOUD SET-UP | MVP IMPLEMENTATION | VALIDATION

ACTIVITIES

Refine business and technical requirements, needed data, and system integration specs.
Design of end-to-end AI solution, uses testing and roll-out plan, MVP success criteria.

Setup of the GCP and Azure/OpenAI projects.
Configuration of data ingestion pipelines, and systems integration (e.g., Sharepoint) on dev/test/prod environments.

Implementation of:
- prompt engineering pipelines
- data processing pipelines
- orchestration, security and monitoring modules
- web application

UAT, the roll-out according to the defined pilot plan and tuning of the solution based on final customers feedbacks

DELIVERABLES

Use Case design document

GCP and Azure/OpenAI projects configured

All software modules implemented in test env
System integrations are configured

Use Case live in production
Feedbacks from pilot

Achieved Benefits

Improved efficiency

43% task reduction

Smart Desk solution can handle routine tasks and frequently asked questions, freeing up human agents to focus on more complex issues

Faster response times

-89% response time

Smart Desk can quickly analyze customer queries and provide instant responses, reducing resolution time and increasing customer satisfaction

Costs Control/Reduction

24% FTE reduction

Smart Desk can handle a large volume of customer inquiries without requiring additional human resources, leading to cost savings for the business

Personalized Support

+54% customer satisfaction

The systems can use customer data to provide personalized recommendations and solutions, improving the customer experience and increasing customer loyalty

24/7 availability

AI-powered systems can provide round-the-clock customer support, improving customer satisfaction and loyalty

Enhanced Auditability

AI-powered solutions can collect and analyze customer data, providing insights that can be used to improve products and services and customer support processes

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Conclusione incontro

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Grazie!