OCX Cognition™

90% Average Increase
In Customer Coverage for NPS® and CSAT

87% Average Accuracy
For Predictive NPS®, CSAT and Propensity Analytics

UNDERSTANDING CUSTOMER AI

Customer AI
Software Architecture and
Analytics Explained

Going Beyond Traditional CX Measurement

We founded OCX Cognition after decades of combined experience in the development and deployment of traditional CX measurement systems. In fact, we previously served as the leadership team for the pioneering Survey Analytics company Satmetrix which, along with Fred Reicheld and Bain & Company, participated in creating the widely adopted Net Promoter Score® and methodology. We know first-hand, the limitations of using survey data for producing CX Analytics. We started OCX Cognition with a commitment to building a new solution with complete, continuous, and connected data using predictive analytics.

But don't just take our word for it, consider the following perspective from McKinsey & Company on the future of CX.

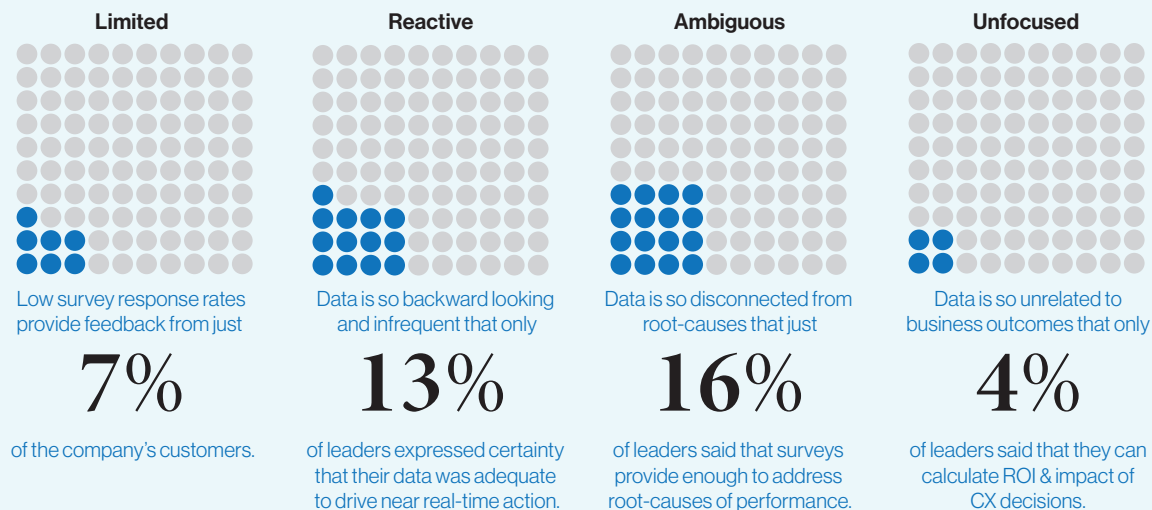### 'Survey says': The shortcomings of traditional CX measurement

While surveys themselves are a valid means of gathering customer insight, they fall short as a management tool for measuring CX performance and identifying and acting on CX opportunities. For organizations to lead from a customer-centric position, they increasingly need a comprehensive view of the full customer journey, as well as the ability to obtain deep, granular insight on what is driving customer experience. They need immediate and individual signals in order to take action "in the moment" and to create relevant experiences for each customer, and they need to demonstrate that the experience enhancements they would like to invest in will result in positive ROI. Survey-based systems have four major flaws that make those critical tasks nearly impossible . . .

Predictive customer insight is the future

Since survey-based systems became ubiquitous, the world of insight generation has transformed through impressive advances in the ability to generate, aggregate, and analyze data. Companies now have access to a broad array of data sets: internal data on customer interactions (both digital and analog), transactions, and profiles; widely available third-party data sets that cover customer attitudes, purchase behaviors and preferences, and digital behaviors, including social-media activity; and new data sets on customer health, sentiment, and location . . . The contrast is stark: Why use a survey to ask customers about their experiences when data about customer interactions can be used to predict both satisfaction and the likelihood that a customer will remain loyal, bolt, or even increase business?

In the article, McKinsey & Company authors also enumerate a list of key flaws facing traditional CX measurement that can be characterized as follows.

4 Critical flaws with today's survey-based CX measurement systems

Limited	Reactive	Ambiguous	Unfocused

Low survey response rates provide feedback from just

7%

of the company's customers.

Data is so backward looking and infrequent that only

13%

of leaders expressed certainty that their data was adequate to drive near real-time action.

Data is so disconnected from root-causes that just

16%

of leaders said that surveys provide enough to address root-causes of performance.

Data is so unrelated to business outcomes that only

4%

of leaders said that they can calculate ROI & impact of CX decisions.

What is Customer AI from OCX Cognition?

Customer AI from OCX Cognition represents a new category of enterprise customer analytics software comprised of configurable, next-generation services, like Generative Customer Analytics, Generative AI, and Automated Machine Learning. Built on the latest technologies like elastic compute, storage-on-demand and advanced machine learning, Customer AI delivers a continuous, unified view of customer analytics that unlocks productivity for teams throughout your business.

Predicting Customer Futures

What if you could predict the future behavior of your customers? What if you could see the risk of losing a major account a year before it happened? How would that customer insight improve your own strategies for account management or operational execution? What if there were a better way to identify customers that are perfect candidates to buy more down the line? How would you adjust sales and marketing to pursue these opportunities? Understanding the viewpoint of all your enterprise customers or distributors in real time has been an unreachable goal for any company. Predicting their future intentions has seemed outside the realm of possibility.

Customer AI software from OCX cognition has made this previously unsolvable problem practical for enterprises today. It analyzes operational data along the entire customer value chain, from sales to support, and continuously predicts the viewpoint of your customers. Even their financial future. Gain valuable insights into how your operations impact customer viewpoints and uncover actionable steps to shape future outcomes in your favor. With OCX Cognition, predicting customer intentions becomes a reality for your enterprise today.

"…Customer surveys are backwards looking, incomplete, infrequent, and just plain wrong. You're right not to trust the insights surveys claim to deliver. Generative CX Analytics change the game…Machine learning meets CX expertise, and the results are predictive, highly accurate, and include every account. Best of all, they update continuously…

Richard Owen
Co-Founder OCX Cognition

The Customer AI Platform

Architecture

Customer AI from OCX Cognition is a secure, enteprise-grade software solution built specifically for continuous customer analytics. The platform includes Program Frameworks, AutoAI/ML operations and a Data Warehousing that work in combination to get you from data to insight quickly.

Program Frameworks

We've taken customer experience expertise developed over decades and built it into the OCX Cognition Customer AI platform with proven Program Frameworks that will accelerate any Customer AI program. This starts with an "outside-in" perspective using data models that match the ways in which customers experience your products and services. Data is compartmentalized into customer journeys that consist of discreet stages. Each representing a logical part of the experience prototypical for your industry and business model. Stages are subsequently broken down into operational driver groups that subdivide each stage and align to operational metrics you're already collecting throughout your business.

Automated AI/ML

Our innovative Auto-ML platform can be configured specifically for your business, providing customized Generative Customer Analytics, Generative AI Data Stories and Predictive Revenue Analytics available to you in days. We work with customers in virtually every state of data readiness. All predictive analytics and machine learning workflows are automated. AI Models are built, trained, tested and maintained automatically on the platform.

Secure Data Warehousing

Customer AI generates a new and novel set of CX Analytics that get refreshed continuously. We host these Analytics for you in a secure Data Warehouse and provide instant access through easy-to-use Mobile or Web Dashboards, APIs or Secure Data Transfer.
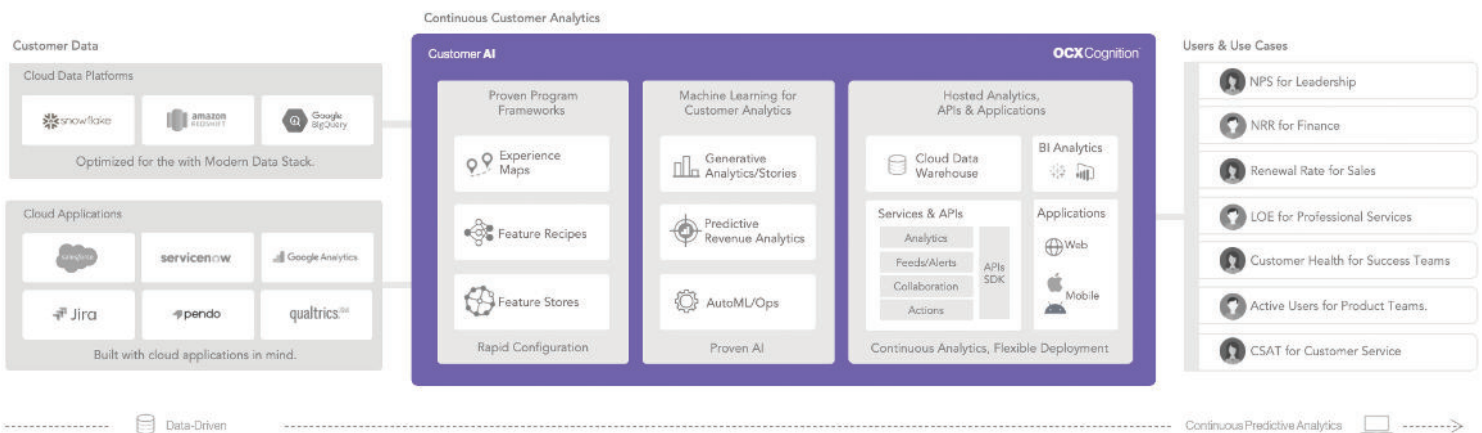
How Customer AI Works

Measuring Experiences

Customer AI produces analytics that measure customer experiences and resulting attitudes. It generates continuously updated scores for each key part of the experience using a structure modeled on the metaphor of a customer journey, then stores them in a relational database. Scores are generated by the platform using machine learning models with operational and attitudinal customer data serving as inputs.

Your Operational and Attitude Data

Businesses today commonly measure a wide range of operational metrics in the course of managing processes and teams. They may capture performance metrics like the timeliness of delivery, team productivity, or developer velocity. They also capture customer behaviors like average repurchase rate or digital product engagement. We call this operational data because it is captured by various teams and systems throughout your operations at different stages in the customer journey. These systems and their data are built for a primary purpose, they capture simple, unambiguous metrics like counts, sums, or averages for virtually every customer at a particular point in a process Other systems are deployed to collect customer feedback. These systems include surveys, ratings or support systems where the attitudes of a small fraction of customers are captured and scored once or twice per year.

Training Customer AI

On their own, operational metrics do not offer much of a perceptive on a customer's overall attitude or health. In fact they often present the business with a diffuse set of signals that can look contradictory and unconnected to financial outcomes. Attitude data from feedback systems is too infrequent and incomplete to be useful in ongoing operations. However, when carefully combined, operational and attitude data can serve as training data for the Customer AI platform. The platform uses this data to build a complete picture of the experiences and attitudes for every customer and shows the impact of operations attitudes and financial outcomes.

The idea of collecting or integrating operational data might seem overwhelming, but don't worry. Customer AI works well at virtually all phases of data maturity. Whether you're starting out with fragmented data dispersed across multiple systems, or your data is unified and stored in a cloud data warehouse, we'll make integrating your data with Customer AI simpler than you think.

"Advances in computing and AI have created an opportunity for innovation, that makes possible a new generation of software we refer to as Customer AI…
At OCX Cognition our Customer AI software pushes past the limitations of feedback surveys, and delivers complete, continuous Generative CX Analytics"

Brian Curry
Co-Founder OCX Cognition
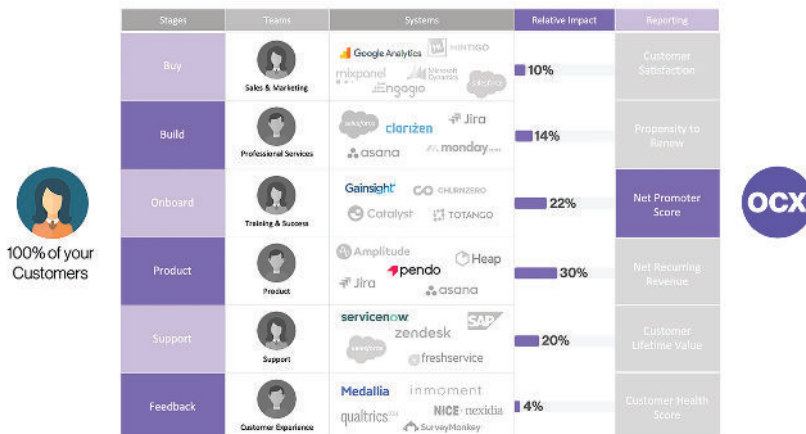
Generative CX Analytics

Using the training data collected from your systems, Customer AI learns how customer attitudes correlate to operational data patterns to build and train a series of predictive analytics models for your business. No single model can effectively generate the diverse set of CX analytics you'll need, or calculate the relative impact of hundreds of operational metrics on each of them. The Generative CX Analytics service in Customer AI is built to automatically produce hundreds of independent machine learning models for each customer. These models are built, trained and tested for each predictive analytic generated. Each is uniquely created and optimized for customer a variety of cohorts based upon data availability. Relative impact is calculated throughout each model to weigh the effect of hundreds of operational metrics on journey stages as well as overall attitudes. These analytics get generated continuously as operational data is updated. Each time, a new set of scores are appended to the data warehouse. Creating a time series that tracks customers over time. All Customer AI models are periodically expanded to include new training data to ensure accuracies that average 87%.

Because Generative CX Analytics are built using operational data as an input, the attribution of all these scores to underlying operational KPIs is built-in. Customer AI users not only see key analytics like NPS® or CSAT, they see the proportional influence each journey stage and operational KPI is having upon them. As a result, Customer AI creates the most complete and connected set of CX analytics available today.

Generative AI Data Stories

Once your Generative CX Analytics are loaded into the data warehouse, they are used to create or refresh both standard and customized reports. Reports are instantly available to you as dashboards, feeds, or integrations. But the platform doesn't stop there. We know data reports and visualizations can get complex. Understanding insights shouldn't always require a degree in data science, so Customer AI also includes a built-in Generative AI service to turn your reporting and analytics into easy-to-understand data stories. Using the same comprehensive analytics that produce the charts and graphs in your dashboards, to automatically create narratives with Generative AI. These data stories can be included within your dashboards, or distributed as a feed to end users.
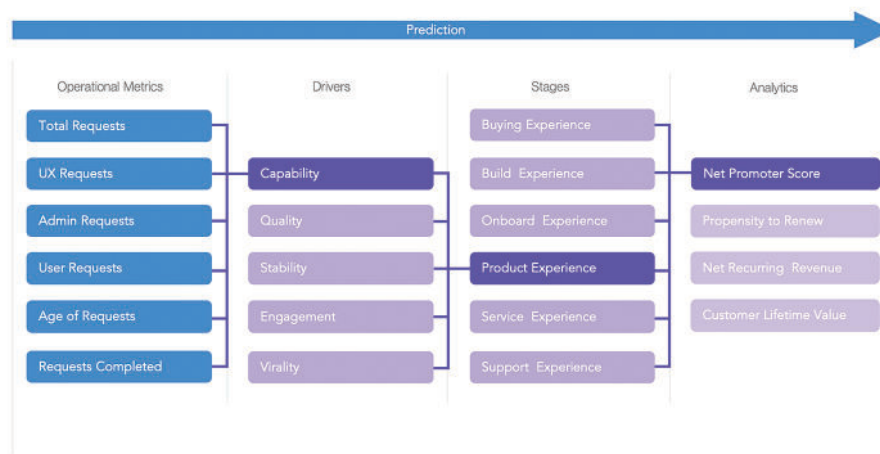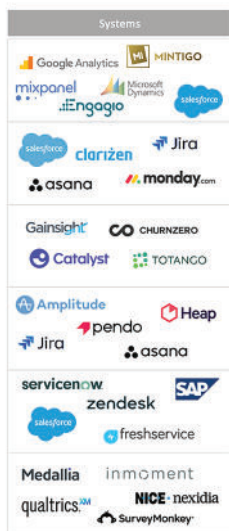
The Case for Customer AI Throughout the Enterprise

CX & VOC

Programs that rely solely on survey sample data have already proven inadequate for today's data-driven operating environment. Customer AI represents a new platform for forward- looking Customer Experience (CX) and Voice of the Customer (VOC) leaders, featuring experience analytics that are complete, continuous and connected to both operational and financial metrics. It's typical for surveys to generate 5-10% response rates once or twice per year, creating tiny data sets that usually under sample negative attitudes dramatically. Customer AI fills in the gaps left by unanswered surveys with highly accurate Generative CX Analytics that are updated continuously as customer attitudes evolve.

Customer Success

Customer Success teams are traditionally asked to provide an authoritative perspective on overall Customer Health, often with inadequate data at hand. Today, these teams are seeing their mandate broaden, as they're asked to drive growth through retention and expansion. Customer AI provides the missing system of insight for Customer Success programs today as they manage the transition from cost-center to growth engine.

Sales & Revenue Ops

Sales and Revenue Operations serve as a lynch-pin for business growth. These teams rely on the best data possible to do their jobs well. Customer AI brings provides them with new, comprehensive customer insights that were previously unavailable. Whether identifying which upcoming renewals are at risk or poised to expand, or building better Ideal Customer Profiles that power better targeting for acquisition, Customer AI to unlocks new potential for Sales and Revenue Operations looking to growth through the existing customer base.

Data & Analytics

Time to insight has never been more important. To deliver value quickly and repeatedly, Analytics teams need more than build-it-yourself AI toolkits that place the burdens of development, maintenance and support on their shoulders. The OCX Customer AI platform provides a highly configurable, enterprise software solution that Analytics Teams can rely on to deliver insight in days, and mission-critical availability over the long term.

Customer Marketing & Communications

Businesses increasingly ask Marketing & Communications teams to extend their mission beyond acquisition to drive customer retention and expansion. Customer AI brings provides these teams with an unprecedented set of insights upon which they can segment, target, and personalize campaigns and communications.

Executive Leadership

Executive teams know that business outcomes are dependent upon customer experiences and attitudes. To make optimal decisions, they need to continuously track these experiences and understand how operations are impacting them. Customer AI connects systems throughout the business to unify fragmented metrics and build a comprehensive set of customer analytics that let leadership teams anticipate customer behavior and avoid surprises.

Learn More at **ocxcognition.com**