

MARKETING AND SALES SUPPORT

Handouts for trainers

Introductory instructions for trainers

We have prepared materials for trainers to follow. They include

- Introduction
- The complete texts as read by the machine voice. The trainer can choose what to say, for example by highlighting certain sentences or concepts.
- Recommendations on where to turn the sound on or off

The presentation can run in two modes

- With audio on
- Without audio on

Presentation with audio on

- In this mode, a machine voice is heard explaining the displayed texts, diagrams and animations.
- This mode is suitable for self-learning.
- The trainer is not recommended to go through the entire content in this way. The trainee's attention may be lost, and the trainee may not focus on what is most important in the content.
- We recommend using this mode no more than 2 times during the presentation.

Presentation with audio off

- If the presenter turns off the sound, they can give the participants an abbreviated version of what the machine voice is saying in the background.
- They can also highlight what is most important about the content being shown.
- The trainer needs to go through the course several times.
- This is because the background machine voice is running all the time, and until the narration is finished, the trainer has no opportunity to move on to the next step in the presentation.

The trainer can either

- do the content switching and scrolling on their own (recommended for online webinars)
- **or** their partner can do it, but it has to be well coordinated with them (recommended for larger audiences)

Link to the course

<https://paitool.eu/courses/paitool-course/lessons/marketing-and-sales-support/>

Educational objectives

Each presenter must understand their educational objectives. In the case of AI, participants should gain the following knowledge:

- Understand artificial intelligence as an information system that is capable of learning,
- Know how to identify those processes where it makes sense to use artificial intelligence or machine learning,
- Know the prerequisites for deploying AI in the conditions of a specific company, such as the need for data, the personnel required, etc.
- Recognize the benefits of implementing AI and the risks associated with implementing the project.

Course of training

Introduction

Hello. During today's presentation, we're going to focus on the use of artificial intelligence in the marketing communications and digital marketing process. We'll look at how AI can change the way businesses communicate with their customers. We'll show an example of fragmented marketing communications and conclude with an introduction to a centrally managed personalization solution.

I'm now going to give you a presentation, the voice of which belongs to artificial intelligence, as a demonstration of one of its capabilities.

🕒 **START THE PRESENTATION**

Slide 1 – introduction

Digitization scenario using artificial intelligence
MARKETING AND SALES SUPPORT

Slide 2 - Introductory example

Slide 3 - Fragmented marketing communication

This is an example of marketing communication in a regular business.

It contains several different communication tools that are entirely independent of each other.

These tools consume and, at the same time, produce many data that are not interconnected. This gradually creates data silos. The larger the number of tools used and the communication volume, the more generated data. However, a unified view of interactions and communication with the customer is lost. Although we reach customers through various channels, they are independent of each other and bring fragmented content to the target group. The customer can get confusing information about products, discounts, or other offerings delivered through various channels.

At the same time, managing such communication is very demanding, as marketers must work separately with each tool to operate the respective channel.

STOP THE SOUND OF THE PRESENTATION

The text will be retold by the speaker in their own words:

This does not bring the expected result, and the solution will not allow employees to develop and implement new ideas and campaigns.

START THE PRESENTATION SOUND

Slide 4 - Centrally managed personalization

This is an example of centrally managed marketing communication, including comprehensive personalization across digital channels using Artificial Intelligence.

This company uses one comprehensive tool to implement multi-channel communication from one source.

The advantage of this approach is the ability to create a Unified Customer Profile that contains all available data. It is possible to communicate through various channels according to customer preferences, company strategy, costs, or other parameters based on the customer profile and artificial intelligence.

Artificial intelligence ensures personalization for each customer and, at the same time, selects the most appropriate communication channel and the time when it sends the communication to the customer.

Artificial intelligence considers all interactions and, with the growing amount of data, constantly improves the impact of communication.

As a result, the customer experience is entirely consistent, and the customer feels that the seller understands them and helps them.

This creates a loyal relationship. Marketers have more time to develop campaigns and product offerings and improve communication strategies. They do not have to focus on the routine operation of marketing tools.

🔊 **STOP THE SOUND OF THE PRESENTATION**

The text will be retold by the speaker in their own words:

Slide 5 - How it all works in the background

Now let's talk briefly about how it all works in the background

Preparation of the campaign based on the acquired knowledge

- The campaign is made according to defined communication strategies with the support of artificial intelligence.

Data entry from various sources into a unified customer profile

- Many data from various sources enter the system, including data obtained in real-time. Together they create a Unified Customer Profile.

Data analysis by artificial intelligence

- Artificial intelligence analyzes interactions, customer behavior, preferences, and other available data according to the goals of the communication strategy.

Design of suitable products, business, and other offers

- Artificial intelligence proposes the most suitable offer for the customer based on the data available in the Unified Customer Profile, including interactions, product recommendations, and offers.

The suggestion of the communication by the most appropriate channel

- At the same time, artificial intelligence proposes a method of communication, including a suitable communication channel, time of sending, and the like.

II STOP THE PRESENTATION

Discussion 1

1. Are companies already using digital marketing tools today? If so, do they mostly use standard tools offered by large platforms (SEA) or are they also interested in tailor-made solutions?
2. How would you characterize companies that use customized marketing solutions? Larger or smaller businesses? Can the most active industries be identified?
3. What problems do customers typically solve? Is it towards reducing marketing costs, increasing the number of clients approached and acquired, dealing with staff shortages - which will they say first?
4. How do you see clients' willingness to go into personalization and addressing clients?
5. Do customers also directly express a demand for the introduction of artificial intelligence? At least indirectly, e.g., by requesting the generation of predictions or the processing of unstructured data or similar?
6. How long does it typically take you to negotiate with suppliers from first contact to contract and project start?

III START THE PRESENTATION

Slide 6 - Presumptions

Slide 7 - Process

The whole process of marketing and sales support can be imagined as the floors of the so-called D.I.K.W. pyramid, which contains four levels of analytics:

- descriptive (**Data**),
- diagnostic (**Information**),
- predictive (**Knowledge**),
- prescriptive (**Wisdom**).

1.Descriptive analytics - the answer to the question "What happened?"

Descriptive Analytics - is a fundamental analysis that, by default, answers the question: What happened?

2.Diagnostic analytics - the answer to the question: "Why did this happen?"

Diagnostic analytics - this is the first of the forms of advanced analytics. This answers the question: Why did this happen?

3.Predictive analytics - the answer to the question: "What will happen?"

Predictive analytics – here, we can use artificial intelligence and neural networks. By default, it answers the question: What will happen?

4. Prescriptive analytics - The answer to the question, "What should I do?"

Prescriptive analytics is often the ultimate limit of a company's analytical capabilities. He answers the question: What should I do?

 **STOP THE SOUND OF THE PRESENTATION**

The text will be retold by the speaker in their own words:

Slide 8 - Data

Quality data is an essential prerequisite for deploying any technology in marketing - including machine learning. In terms of use, we can segment the data into a simple matrix: internal and external, structured and unstructured.

Internal data: This is data from internal systems such as orders, invoices, products, prices, etc.

External data: It includes customer behavior, interactions, and pending transactions, such as closing the browser before sending the order.

Structured data: The value of structured data is its specificity. If we have good data quality, we can get many benefits without using artificial intelligence.

Unstructured data: However, the real treasure lies in unstructured data. Under this term, we can imagine, for example, e-mail communication, recordings of telephone conversations, but also Facebook posts, and various other forms of online communication. Machine learning is an excellent helper in analyzing this form of data.

 **START THE PRESENTATION SOUND**

Slide 9 - IT tools

CDP- Customer Data Platform

In terms of IT tools, it is appropriate to use the so-called CDP, Customer Data Platform. It is a unified data platform that combines different types of customer data and

creates a unique customer profile, which can then be provided with various tools for marketing communication.

CEP- Customer Engagement Platform

Another suitable solution is CEP, the Customer Engagement Platform. It is a tool for centralized management of marketing communications.

🔊 **STOP THE SOUND OF THE PRESENTATION**

The text will be retold by the speaker in their own words:

Slide 10 - People

Competent people, whether on the side of the client or the supplier, are a crucial prerequisite for the project's success.

On the client's side:

Sponsor - the owner of the process, the person who has the resources to finance and enough power to enforce the change.

The top position on the customer side is the project sponsor, who is responsible for its financing and, at the same time, ensures the necessary cooperation or eliminates resistance to change.

Marketing expert - expert in marketing procedures, digital communication management.

To align with the company's goals, experts must be involved, who are responsible in the company for creating a marketing strategy.

Data expert - expert in data sources, analytics, customer data segmentation.

To ensure the actual value, it is necessary to involve experts who understand the data obtained and can evaluate their significance for the company's business strategy.

Support team - planning and implementation of marketing communication.

A support team is needed to ensure the implementation of marketing communication and its planning.

Slide 11 - People

On the supplier's side:

It is essential on the supplier's side to have the following profiles available.

Architect - design of the necessary infrastructure, integration specialist.

An architect provides the necessary infrastructure design and solves the integration with cooperating applications.

Consultant - creation of communication scenarios

For setting the optimal communication strategy, it is necessary to have a consultant available to design communication channels, who actively communicates with the client's process expert and, according to his instructions, configures the process of artificial intelligence learning.

Data scientist - analysis and preparation of data for machine learning.

For machine learning to be possible, the data must be analyzed and adapted to a form that artificial intelligence tools can use.

Expert - for data visualization and interpretation.

An expert in data visualization and interpretation is also needed.

Consultant - in the field of data ethics and GDPR.

It is equally important to have a consultant in data ethics and GDPR.

Slide 12 - Organization

Practical cooperation of the professional teams of the supplier and the client is essential for the success of the project. Fundamental factors, in this case, are a project plan with appropriately set milestones, a communication model defining the system of project meetings, but mainly sufficient allocation of professional teams, and a flexible process model supporting the proactive definition of requirements and timely response suggestions of the implementation team.

Project plan

- appropriately set milestones and sub-objectives of the project

Communication model

- interaction of professional teams
- regular meetings
- formulation of requirements
- responding to suggestions from the implementation team

Human capacity

- sufficient allocation of the experts
- flexible process model

Slide 13 - Benefits and risks

|| STOP THE PRESENTATION

Discussion 2

1. *Building an IT environment is a gradual process; it starts with simpler solutions and can progress to artificial intelligence. What does this evolution look like in the cases you have personally encountered?*
2. *In your opinion, is the customer willing to pay for the analysis of their needs as well, or are they trying to take on this role themselves? When you come into contact with supplier companies, to what extent do you have clarity on what you need?*
3. *What problems do you encounter in getting data? Do we mean both technical problems (fragmented and distributed data) and, say, organisational or competency problems?*
4. *How much of your projects are about integrating your solution to third-party systems? How did it work, was it necessary to involve the suppliers of these solutions or did you as a client manage it with your own staff?*
5. *How long does the project probably take?*
6. *Did you experience any problems in getting sufficiently skilled staff? Did you have trouble freeing them up in sufficient numbers for the project?*
7. *What has been your experience supporting management? Are they aware of their role in the project?*

⏪ START THE PRESENTATION

🔊 START THE PRESENTATION SOUND

Slide 14 - Benefits

Artificial intelligence can enhance virtually all business functions in retail. The most significant benefits include:

Fast "Time to Value"

- A fast implementation that will deliver benefits in a short time.

Hyper-Personalization

- Fully personalized communication for individual customers.

Overall communication optimization

- communication scenarios
- communication channels
- communication times
- communication content

Personalized customer experience

Optimized customer shopping path.

Slide 15 - **What we should be careful about**

Potential risks include:

Insufficient Data.

Artificial intelligence will have nothing to count on if we have too little data.

Poor Data.

Artificial intelligence will count and make incorrect suggestions if we have data with insufficient quality.

Use of automation in inappropriate communication scenarios.

It is necessary to devise suitable communication scenarios and content for a specific company and automate it.

Insufficient content.

For example, if I have an unsuitable or outdated offer, the result will not be good.

Expectations that this is a one-off project without the need for continuous development.

The marketing automation project requires constant evolution and work on communication scenarios, content, offerings, etc.

II STOP THE PRESENTATION

Discussion 3

1. *Do you have a solid business plan and payback calculation at the beginning of the project? If so to what extent are these realistic cost-benefit calculations?*
2. *Have you been able to frame the cost of the project in past cases? What might the price be based on?*
3. *What are the most common false expectations you have registered in your projects?*
4. *How long after project deployment did you contact the contractor for assistance? Did they provide it under warranty, or was it for services beyond warranty?*
5. *Is there an ex-post cost-benefit evaluation after the project is completed in the company?*

🕒 START THE PRESENTATION

Slide 16 -This course was created in collaboration

⏸ STOP THE PRESENTATION

Conclusion:

In conclusion, we would like to underline that digital transformation in marketing opens up new possibilities and opportunities for businesses. The use of AI and a centralized approach to marketing communications can lead to faster "Time to Value", hyper-personalization and the creation of a consistent customer experience. However, we shouldn't forget the importance of quality and the right data, as well as the constant need for development and optimization.

Finally, I would like to thank all participants for their attention and openness in listening. I hope you were inspired by our presentation and if you have any questions or need more information, we are here to help.