ONLINE SALES
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/online-sales/

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. The use of artificial intelligence in online sales is becoming an essential part of online store strategies. Capturing detailed information about customer behaviour and preferences in real time provides invaluable benefits in creating personalized experiences and increasing the efficiency of the buying process. In this presentation, we will explore how artificial intelligence helps to gain deeper insights into the mind of the customer and how this information can be used effectively on online sales platforms.

I am now going to play you a presentation that features the voice of artificial intelligence as a demonstration of one of its capabilities.

⊙ START THE PRESENTATION

Slide 1 - introduction

Today, artificial intelligence is increasingly being used by online stores to promote online sales.

Slide 2 - Introductory example

We will show how this works with an example.

Slide 3 - Record of the website visit

If we take a closer look at this brief record of a user's activity when visiting a website, we realize that we can get more details about our customers.

We can understand customer behaviour and gain a realistic view of the customer group and its interests.

For example:

The customer may be a busy mother who visits the website. She uses the 'search' button because she doesn't have time to click through the pages. She is looking for hiking boots. She finds them on the product page. Standard colours do not suit her, so she plays with colour options for a while. When she chooses what she likes, she reads the product information and comments from other customers. She finds that the selected item has only two stars. Therefore, she will look at other alternative products and continue browsing the site. Finally, she puts the product that suits her best in the shopping cart. The moment she clicks on "Order," her little daughter's cry interrupts her, and she also realizes that it's dinner time. These urgent priorities will force her to decide that she doesn't need new shoes at this moment, has more important things to do, and closes the web browser.

Slide 4 - Micro-moments

How do you record and interpret all these micro-moments and signals before the customer leaves the site?

How do you record and interpret activities before the customer leaves the site or before they leave the shopping cart, and how to prevent what we saw on the previous screen?

One answer is the use of artificial intelligence. Let's look at what we need to deploy artificial intelligence in online sales.

❚❚ *STOP THE PRESENTATION*

> ***Discussion 1***
> 1. *Are you registering an increased interest in smart solutions for online sales lately or let's say since Covid?*
> 2. *If so, what types of companies are involved? Larger or smaller businesses? Can the most active sectors be identified? Does this apply to your business as well?*
> 3. *To what extent is your company also dealing with the idea of becoming producers as well as consumers? So-called PROSUMERS?*
> 4. *Do companies have clarity on the topic of energy management? Are they clear about what all Smart Energy solutions encompass?*
> 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?*

▶ *START THE PRESENTATION*

🔊 *START THE PRESENTATION SOUND*

Slide 5 - Presumptions

Slide 6 - Process

To deploy artificial intelligence in online sales, we need to understand the buying process perfectly.

🔇 *STOP THE SOUND OF THE PRESENTATION*

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

It means:

Listen: We listen to what customers say and do.

Understand: We process information and data to understand customer interest and intent.

Decide: We decide on the best and most appropriate event to provide the customer with a fully personalized experience when he is active.

Improve: We learn from the results of each customer interaction and continually improve our responses to better meet their needs.

Slide 7 - Process

When identifying customer needs and preferences, it is necessary to capture all the details of customer behaviour.

The most important aspects of visiting a website:

• **Date and time of the visit**: What is the exact time of the customer's visit? Is this a repeated visit?

• **Used equipment**: What device did the customer sign in from?

• **Operation system**: What is the operating system of the device?

• **URL address**: What URL is it accessing from?

• **Searched products**: What products is the customer looking at?

• **Product categories**: What product categories did the customer visit?

• **Location**: What location does the customer access from?

• **Use of cart**: What did the customer put in the basket, and what did the customer remove? Did they change the size, quantity, and so on?

• **Contact information**: What customer contact details do we have?

• **Order history**: What orders have they made in the past?

• **Last order**: What is the status of their last order?

• **Complaints**: Have they solved any complaints or returned the goods?

And so on. These little things are essential if we want to influence the customer during the 2 minutes they spend on our portal.

🔇 *STOPPING THE SOUND OF THE PRESENTATION*

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

Slide 8 - Data

We can use the data -for a better understanding of customers and -for personalization of the customer experience.

The data can be used to understand customers better and select appropriate actions to personalize the customer experience.

Suppose we capture all this data and details of customer behaviour in real-time. We can use them for a better customer experience during the next visit.

From the knowledge of previous visits, for example, it may be clear that the customer tends to a particular product group and searches at a certain price level. This experience can be used to make the current customer's visit as effective as possible.

Of course, all this must happen in real-time. Otherwise, the effort is useless.

We are interested in:

• Affinity for certain products

• Affinity for product categories

• The longest-running activities

• Preferred locations

• Preferred devices

• Price sensitivity

• Behaviour and ordering patterns

• Number of complaints

• The site from which the customer typically comes

• And many more

🔊 *START THE PRESENTATION SOUND*

Slide 9 - Data sources

The solution is based on data sources from two groups:

Online group, containing data captured from the site visit, such as date, time of visit, purchase details, and client behaviour activities)

Offline group, containing data from, for example, ERP, i.e., from the corporate information system, from CRM, i.e., from the customer relationship management system, from analytical tools, and marketing automation tools,

Slide 10 - How does it work?

How does it work?

Data collection: Data capture from pre-built integrations thanks to drag & drop tagging of any page. The process must follow the consent to the processing of personal data.

Identity management: Automatic unification of customer profiles and identities from multiple sources and visits into one profile.

Customer context: Behavioural enrichment of customer information, metrics calculation, affinities, and categorization in real-time. The result is the basis for proposing the right actions

Use in customer-directed action: Using individual information for real-time personalization during a visit to the merchant's website or portal, including real-time reporting and analytics

🔇 *STOP THE SOUND OF THE PRESENTATION*

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

Slide 11 Deployment in practice

The system implemented in practice provides the following services:

- Data collection: Monitoring and collecting data on customer behaviour and preferences.
- Segmentation: Customer segmentation and personalization of search, content, and offerings.
- Product offers: Product recommendations and suggestions.
- Recurring customer acquisition: Addressing a lost customer, for example, by email in case of an abandoned cart and the like.

🔊 *START THE PRESENTATION SOUND*

Slide 12 - People

A qualified team is a key to the success of all projects. The same is true in this case.

In the case of deploying modern solutions related to online sales, it is necessary to take into account the following professional profiles:

1. **The architect** is responsible for designing the necessary infrastructure. At the same time, his profile is combined with the role of an integration specialist.
2. **The project manager** is responsible for the overall management of the implementation project and its successful completion in quality, time, and within the budget.
3. **The data processing expert** oversees the entire data collection and technical processing agenda.
4. **The Data Ethics and GDPR Consultant** is responsible for ensuring that the processing of personal data is following the law and consent provided by the customer to the website operator.
5. **The software specialist** is responsible for selecting, installing, and setting up all the deployed and used applications within the solution.
6. **The web analytics and personalization consultant** is responsible for optimally obtaining information from customer visits and correctly interpreting the data obtained.
7. **CX business consultant** is an expert in the customer experience and ensures the ease of use of the site and its attractiveness for the customer.
8. **An eCommerce business consultant** is an expert in e-commerce and determines, for example, how to use a product catalogue, work with a shopping cart, or link to payment gateways.

🔇 *STOP THE SOUND OF THE PRESENTATION*

⏸ *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 many 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*

🔇 *STOP THE SOUND OF THE PRESENTATION*

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

Slide 13 - Benefits and risks

Slide 14: - Benefits

Click on the arrows for more information.

Order growth
- By verifying customers' needs in real-time, we can make targeted and relevant product recommendations at every moment of their visit, and personalized content supports sales, including so-called cross-selling and up-selling.

Higher customer loyalty
- Individualized information will allow us to recover customers who have not completed their visit or order. We can address the customer through various digital channels and select the ones that suit him best.

A comprehensive approach to the customer
- By integrating various tools to support the customer experience, we provide customers with a unified and fully personalized experience while reducing data errors, risks, and costs.

What to watch out for? - ask a question to the audience

🔊 *START THE PRESENTATION SOUND*

Slide 15 What we should be careful about

Not every use of artificial intelligence in online sales will bring outstanding results. The following should be considered:

1. **Insufficient data quality**

The use of advanced analysis tools or artificial intelligence depends mainly on the quality of the data used. If data is poorly processed, inconsistent, or incomplete, artificial intelligence cannot learn properly and gives customers unsuitable recommendations.

2. **Poor implementation**

Hasty and ill-considered implementations often end in disappointment and zero or negative benefits for society. Rather, such a site may discourage the customer from purchasing or revisiting the online store.

3. **Exaggerated expectations from artificial intelligence**

Artificial intelligence alone does not guarantee a successful business. For example, it cannot replace missing or incomplete product descriptions. It also fails to increase the sales of low-quality products with bad customer reviews.

‖ *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:

Online sales are increasingly dependent on artificial intelligence that can gather and interpret a wealth of customer details in real time. It provides us with personalised recommendations and content. With this information, we can offer product recommendations to customers, reach out to them in case of incomplete purchases and increase their interest in online shopping. When deploying AI, it's important to be mindful of data quality, thorough implementation and realistic expectations in order to achieve real success and ensure that AI contributes to better online sales results.

Finally, I would like to thank all the 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.