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Balancing AI, Automation, and Human Touch in Customer Journey

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Craft the Perfect Customer Journey: AI, Automation, and the Human Touch

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Executive Summary

The B2B technology landscape is experiencing a paradigm shift. Artificial intelligence (AI) and automation rapidly reshape customer interactions, sales processes, and overall business operations.

While these advancements offer undeniable potential for efficiency and personalization, B2B tech companies face a critical strategic imperative: how to achieve an optimal equilibrium between leveraging these technologies while maintaining the irreplaceable value of the human touch.

This white paper delves into the strategic integration of AI, automation, and human expertise to craft frictionless yet empathetic customer journeys within the B2B tech sector. By capitalizing on data-driven insights and AI-powered tools, companies can personalize interactions, streamline processes, and liberate valuable resources for strategic initiatives.

Yet, amidst this technological revolution, the essential role of human connection remains paramount. This white paper equips B2B tech leaders with the knowledge and practical guidance to achieve this delicate balance, which fosters long-term customer loyalty and drives sustainable growth.

Introduction

We live in exciting times and witness amazing technological developments almost daily. We have just scratched the surface of what humans can achieve with AI. Generative AI is transforming how we work and becoming a powerful companion in almost all walks of life. Companies constantly identify new use cases to exploit these capabilities and differentiate themselves from competitors.

> *72% of business leaders believe AI will be the future business advantage.* - *McKinsey*

However, in the rush to adopt AI and automate everything, we should focus on the human touch, which remains essential for an organization's growth.

The Potential and Pitfalls of Automation

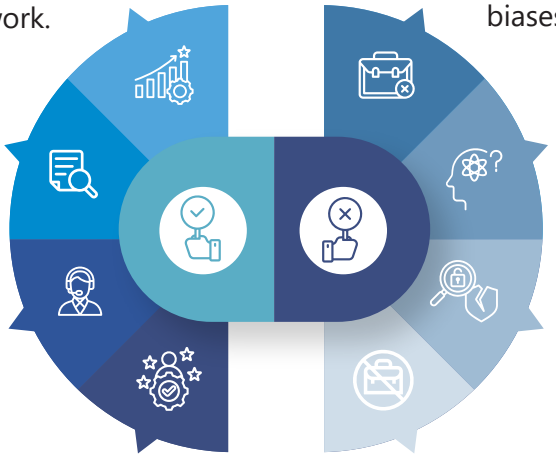
The role of AI is significant in personalized marketing, proactive customer service, and enhancing resonance at every stage of the customer journey.

There are inevitable bumps in the road while leveraging AI. Here is a quick overview of the pros and cons of AI:

Increased Efficiency and Productivity
AI automates repetitive tasks, freeing humans for more complex work.

Enhanced Data Analysis
AI can analyze vast amounts of data to identify patterns and trends.

Improved Customer Service
AI chatbots can provide 24/7 support and handle basic inquiries.



Algorithmic Bias
AI algorithms can perpetuate existing biases in the data they are trained on

Lack of Empathy
AI may struggle to understand and respond to complex customer emotions

Privacy Concerns
AI systems collect large amounts of data raising privacy concerns

Personalized Experiences
AI can personalize recommendations and content based on individual user preferences

Job Displacement
AI automation may lead to job losses in certain sectors while creating new jobs in other sectors

AI leverages customer data to optimize and personalize customer experience. AI offers positive business outcomes such as the following:

- **Increased customer lifetime value (CLTV):** AI helps you dig deeper into customer tastes, preferences, and behavior to craft personalized recommendations that boost customer satisfaction and loyalty.
- **Reduced customer churn:** You can proactively track and monitor customers at risk of churn and take measures to prevent it.

- **Improved decision-making:** AI crunches critical data to identify trends, patterns, and customer behavior and makes data-backed decisions.
- **Better lead conversion rates:** With AI, you can qualify leads, assign scores, and nurture them based on intelligent insights.

However, strategic human intervention at the right moment is crucial to cultivate emotions, empathy, and responsibility that make them indispensable in this AI revolution.

The Importance of Human Touch

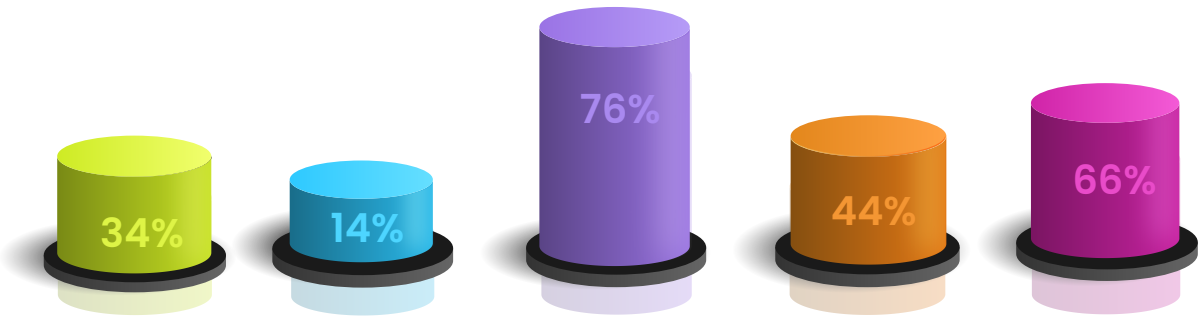
Jeff Bezos once said, "When I'm talking with people outside the company, a common question arises: What will change in the next five to ten years? But I rarely get asked, what will not change in the next five to ten years? Customers will still want low prices, fast delivery, and a big selection."

This is a critical perspective to remember when designing customer journeys. What customer experiences do the customers want to keep the same while they embrace technology, take advantage of AI and the benefits of automation, and receive personalized experiences?

They want companies to anticipate their needs, bring in the human touch, and provide excellent experience.

> *"In the age of automation, the human touch remains a critical differentiator. While technology excels at efficiency and personalization, customers still crave genuine connection and empathy. The key lies in striking the right balance, leveraging AI to augment human capabilities and ensure seamless intervention when needed."*
>
> - ***Selva Pandian, VP, Cloud Practice, PreludeSys***

AI and Human-in-the-Loop: A Powerful Partnership



- **34%** of all business-related tasks today are performed by machines. (World Economic Forum)
- **14%** of business leaders leverage generative AI in marketing and sales. (McKinsey, 2023)
- **76%** of consumers worry about misinformation from AI tools. (Forbes)
- **44%** of customers believe human-generated content is clearly superior to chatbot content. (Forbes)
- **66%** of jobs could be partially automated by AI. AI will complement these jobs, not entirely substitute it. (Goldman Sachs, 2023)

E-commerce: A Comparison Study

Two decades ago, we heard about e-commerce taking over almost all retail sales. In 2024, e-commerce accounts for only 16% of all retail sales. This means that people must still be ready for a complete click-and-mortar experience.

> ***94% of customers shop in physical stores, and nearly 3 million retail trade businesses are in the US alone.***

Even though e-commerce provides convenience, flexibility, and savings, we should ask ourselves why it still contributes less than 20% of total retail sales. Beyond logical and rational reasons, there are psychological reasons for this behavior. Retail sales are not just about buying a product; it is an experience that e-commerce shopping can never offer.

Here are some of the reasons why retail takes the more significant portion of the pie:

- The sensory experience of touching and feeling the product while shopping cannot be replaced in e-commerce shopping.
- E-commerce must catch up on socializing with friends or family in physical stores.
- The ability to browse physical stores and make impulse purchases satisfies a desire for immediate gratification, which online shopping doesn't offer as readily.
- The customer can feel relatively safer shopping at physical stores. Unlike e-commerce, there are fewer concerns about security breaches and scams.

E-commerce businesses use AI to automate their processes and enhance their customer experiences. Traditional retail shopping has the human touch that no AI can replace, which is why millions of people still prefer the retail experience.

From Fragmented to Frictionless: The Recipe to a Seamless Customer Journey

The buyer's journey is complex; dozens of automations are in place at every stage to ensure context, clarity, and connectivity. To achieve these three C's, you need to ensure that your platforms talk to each other. Platforms like MuleSoft act as your bridge builder, helping you seamlessly integrate your tools and platforms (Salesforce, for instance) with other applications that your business might use (ERPs or social media platforms, for example).

Integration helps you:

- Eliminate manual data entry and automate data transfer between systems to free up valuable resources and reduce human error.
- Break down data silos and get a holistic picture of the customer journey, allowing for streamlined processes and improved decision-making.
- Streamline processes to utilize resources for other tasks and foster stronger relationships and loyalty.
- Automating the data transfer between systems can save costs. This realocates valuable resources for higher-value tasks and minimizes human error, leading to significant cost savings.

Data Security: Building Secure Customer Journeys

Customers share their data throughout their buying journey, from their first interaction with your brand until closure. This data could include their name, address, and payment information. While this data is valuable, it is also personal. Customers are concerned about how this information is collected, used, and protected. Therefore, it is essential to ensure that no data breaches occur by implementing robust measures and adhering to critical regulations.

Five Crucial Steps to Keep Customer Data Safe

1. Know your Data

The primary step to data security starts with collecting the right, relevant, and required data. Identify and classify sensitive data and understand what needs the most protection.

Adhering to data privacy regulations is not just a good practice; it's a legal and ethical obligation. Regulations like the General Data Protection Regulation (GDPR), California Consumer Privacy Act (CCPA), and Payment Card Industry Data Security Standard (PCI-DSS) give customers control over their personally identifiable information (PII). Companies must obtain explicit consent for data collection, explain how data is used, and provide mechanisms for customers to access, rectify, or erase their data.

2. Secure your Systems

Implement robust measures such as data encryptio making it unreadable to unauthorized users in case of a breach. Grant access to customer data based on job roles and responsibilities through Role-based Access Control (RBAC).

Mask sensitive data like credit card numbers displaying only the basic information required through data masking.

3. Stay Vigilant

Patch software vulnerabilities as hackers exploit these weaknesses to gain access to systems. Monitor systems and user activity for suspicious behavior that could lead to a security breach.

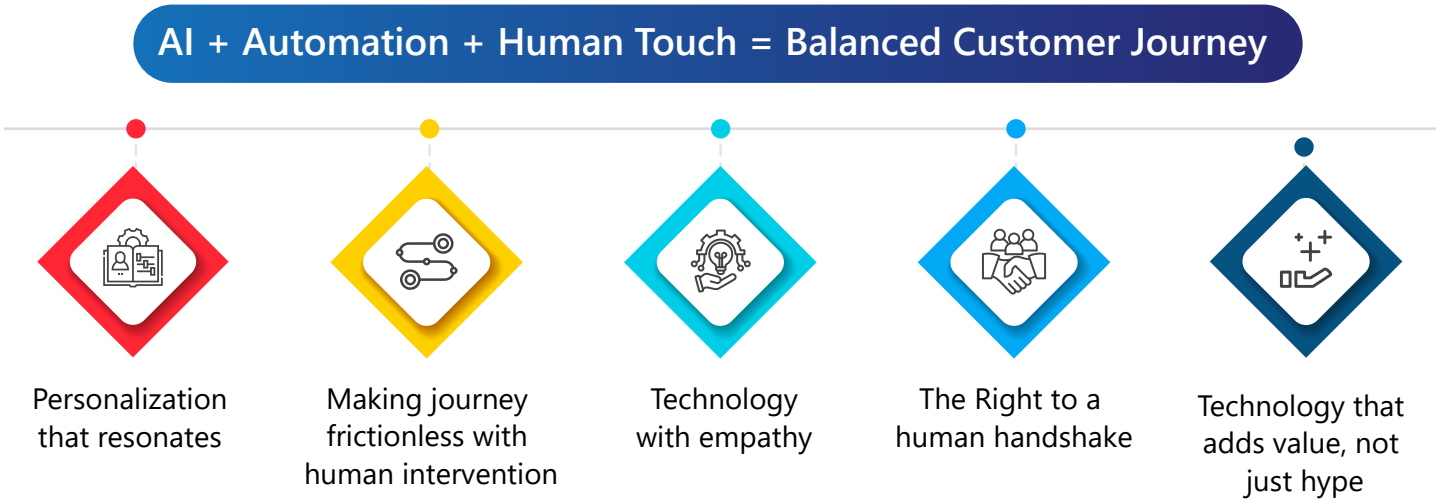
4. Educate and Empower your People

Offer your employees training and educational materials on data security best practices, such as identifying phishing scams and creating strong passwords. Guide them on incident responses so that you can minimize damage.

5. Secure Third-Party Access

If you grant access to third-party vendors, be sure to evaluate their security practices before they have access to customer data. Draft detailed contracts with vendors to outline data handling protocols and breach notification requirements.

Five Key Factors for a Balanced Customer Journey: AI, Automation, and the Human Touch



The high-tech SaaS and software industry thrives on innovation, constantly seeking ways to enhance the customer experience. While AI and automation offer undeniable potential for efficiency and personalization, striking the right balance with the human touch remains paramount. Here are five critical factors for achieving this delicate equilibrium.

Factor 1: Personalization that Resonates

→ The personalization imperative

Customers today expect experiences tailored to their needs and preferences. 80% of consumers are more likely to do business with a company that provides personalized experiences (Salesforce). AI analyzes data to personalize content, product recommendations, and marketing messages, driving customer engagement.

→ The human touch distinction

Over-personalization can backfire, but the human touch is the key to preventing this. While AI can analyze browsing behavior to personalize email content, a human representative can craft a more natural and engaging tone, making the customer feel genuinely understood. This reassures the customer that algorithms do not solely dictate their experience.

A Real-life Example of Over-Personalized Marketing

Target's prediction of a teen customer being pregnant and sending relevant product campaigns before the teen's parents knew about it.

> "My daughter got this in the mail!" he said. "She's still in high school, and you're sending her coupons for baby clothes and cribs? Are you trying to encourage her to get pregnant?"
>
> The manager didn't have any idea what the man was talking about. He looked at the mailer. Sure enough, it was addressed to the man's daughter and contained advertisements for maternity clothing, nursery furniture and pictures of smiling infants. The manager apologized and then called a few days later to apologize again.
>
> *Source: Forbes*

Factor 2: Frictionless Journeys, Powered by Human Insights

→ AI for streamlining the experience

AI can reduce customer service costs by up to 30%. Customers crave a smooth and effortless journey across all touchpoints. AI can automate repetitive tasks (e.g., scheduling appointments and answering FAQs) and leverage chatbots to answer basic questions. Additionally, AI can predict customer needs based on past behavior (e.g., suggesting relevant support articles), further streamlining the experience.

→ Human expertise for course correction

While AI offers efficiency, it's not infallible. Unforeseen issues or complex problems can arise. Here, human expertise is critical. Customer service representatives with AI-powered insights can diagnose issues faster and provide personalized solutions, ensuring the journey remains frictionless.

Factor 3: Technology with Empathy

→ AI for mimicking human nuance

Customers want answers to their queries at any time of the day. According to VentureBeat, over 50% of customers expect a business to be available 24/7. Advances in AI allow it to mimic human communication styles, creating a more natural and engaging experience. Chatbots can be trained to use empathetic language and respond to customer emotions, while AI-powered marketing messages can be crafted with a more human-like tone.

→ The irreplaceable human connection

Despite AI's advancements, genuine human connection remains irreplaceable. **91% of consumers** value speaking with a live representative when they have questions or concerns (Microsoft, 2022). Customers still appreciate interactions with real people who empathize with their needs, understand their frustrations, and provide emotional support.

Factor 4: The Right to a Human Handshake

→ Understanding human needs for interaction

While AI and automation offer convenience, some situations demand human interaction. Customers may prefer to speak with a human representative when making complex purchases, dealing with sensitive issues, or simply seeking reassurance. A study by Zendesk (2023) revealed that 67% of customers expect companies to offer multiple channels for customer support (phone, email, chat).

→ Strategic human intervention

Companies should identify key touchpoints where the human touch is crucial. This could involve offering live chat options for complex inquiries or providing dedicated customer success representatives for high-value clients.

Factor 5: Technology that Adds Value, Not Just Hype

→ Focus on customer needs

Technology should be implemented with a clear purpose — to enhance the customer experience. Simply adopting AI or automation for expediency can be counterproductive, creating unnecessary complexity or frustration for customers.

→ Human evaluation for actual value

Companies should involve human stakeholders in evaluating the value proposition of new technologies. Customer service representatives and sales teams can offer valuable insights on how technology can best address customer needs and pain points.

By focusing on these five key factors, high-tech SaaS and software companies can leverage the power of AI and automation to create efficient, personalized journeys while ensuring the human touch remains a cornerstone of exceptional customer experiences. This balanced approach fosters customer loyalty and drives long-term success.

Self-Service and Customer Service Challenges

Many companies encourage self-service and offer customer portals and chatbots, which is excellent. Still, when customers need to contact a customer service team, the contact details are not readily available. Customers must navigate a maze of pages on the website to find the contact details and connect to customer service.

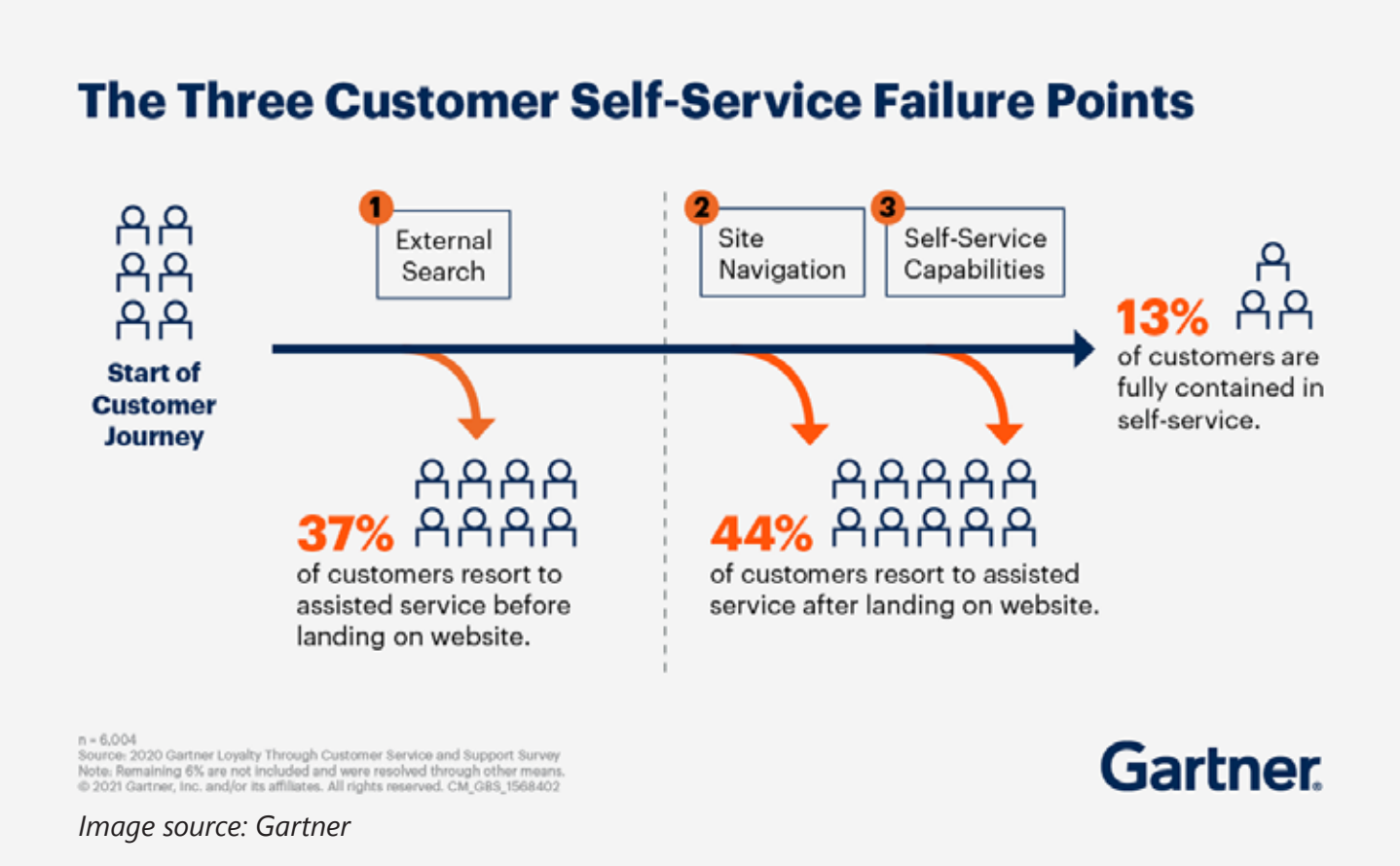


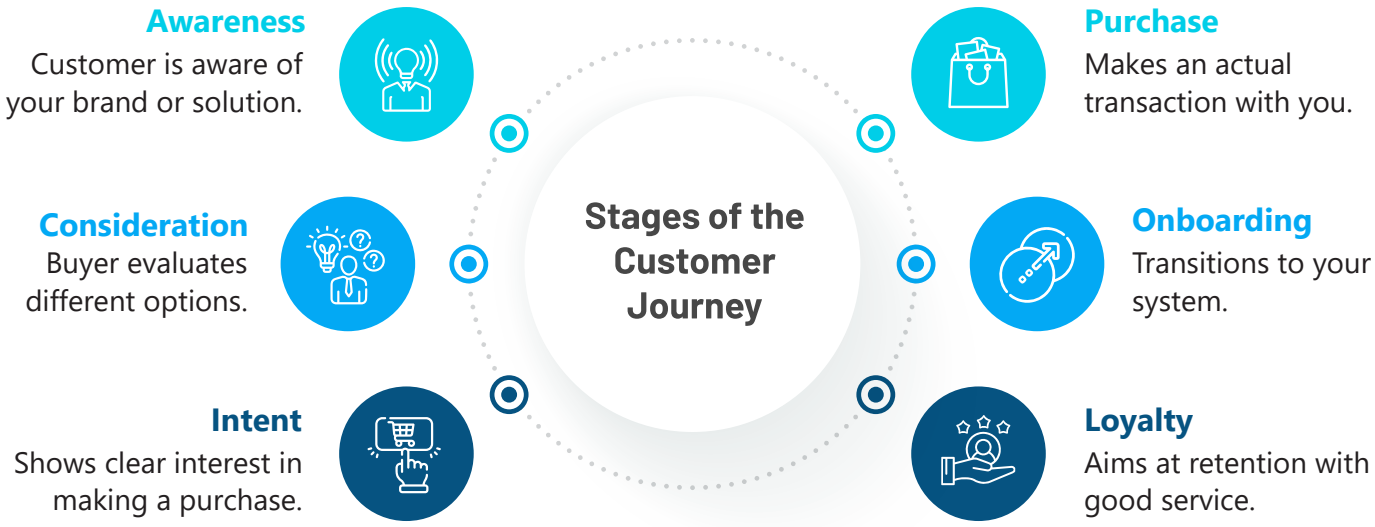
Image source: Gartner

Once you have the contact details, talking to the customer service agent is the next challenge. Navigating the call tree and the IVR system in a loop before finally speaking to an agent becomes arduous. This can be very frustrating as the customer experiences all of it when they are already facing an issue and are trying to solve it.

Now, let's delve into the different customer journey stages, a crucial aspect of our business. By effectively balancing AI, automation, and human expertise, we can ensure that each step of this journey is optimized for a great customer experience, making our customers feel valued and integral to our operations.

Six Stages of the Customer Journey

The following are the typical stages of a customer's journey.



1. Awareness and Consideration

Marketing plays a significant role during the awareness and consideration stages of the customer journey. Awareness creates interest, which then moves to consideration depending on the urgency and relevance to the customer's needs.

Role of AI

Content Creation	Personalization	Send Time Optimization
Generate content relevant to the customer's industry and persona.	Tailor content based on browsing patterns and search requests.	Send emails at optimal times based on customer past email engagement.

Role of Automation

- **Journey automation**
  Automate the marketing journey based on customer responses to content through various channels.
- **AI-powered tools**
  A journey builder helps build customer journeys across key channels such as email, ads, and websites. An AI-based personalization builder can enable the personalization of relevant content to a specific audience.

Role of Human Touch

Products like Marketing Cloud Personalization, Data Cloud, and Microsoft Fabric can be used to identify the customer's need for assistance. For example, if a customer searches and navigates multiple search result pages or opens more than one search result, this signals that the customer cannot find what they are looking for. This is a good time for the marketing rep or a BDR to give a call and chat with the customer about their needs

A leading tech company struggled with managing separate Salesforce systems. PreludeSys helped them merge the systems and optimize Service Cloud, resulting in a 100% streamlined service experience and an 85% operational efficiency boost.

Read the full story

2. Intent and Purchase

During this stage, the sales team does the heavy lifting, meeting different stakeholders, exploring needs, providing demos, and sharing quotes.

Role of AI

Behavior insights

Understand customer behavior signals and involve the sales team at the right time.

Risk recognition

Identify risk in deal closure and alert senior leadership for intervention.

Product suggestions

Offer relevant add-on products and services based on previous buying patterns.

Content creation

Generate draft responses to customer questions and emails.

Role of Automation

- **Journey automation**
  Automate the journey based on customer responses to content through various channels.
- **Process automation**
  Automate data entry tasks, note creation, reminders, and quote generation with predefined product bundles, prices, and product rules.
- **Alerts and notifications**
  Based on data-driven insights, trigger alerts and notifications for the sales team to connect with the customer.
- **AI-powered tools**
  Generative AI helps craft sales emails, create call summaries, and eliminate manual data entries to update leads and opportunities.
- **Pipeline management**
  Understand the health of opportunities to prioritize leads in your pipeline and identify potential gaps in the pipeline with accurate forecasts.

Role of Human Touch

Strategic Intervention: Use products such as Marketing Cloud Personalization, Data Cloud, Einstein Activity Capture, Salesforce Revenue Lifecycle Management, or similar tools to identify signals that require human intervention or leadership team involvement.

For example, customers who visit the Pricing page, download the implementation guide, review multiple quotes, and read customer reviews are signals for human intervention to eliminate risk and accelerate deal closure.

3. Onboarding and Loyalty

Role of AI

Personalized recommendations

Offer customized recommendations based on user adoption.

Predictive insights

Provide key insights during their journey and an omni-channel self-service experience.

Nudges

Automate nudges to increase product and service adoption.

Notifications

Notify the product team proactively of any issues.

AI-powered chatbots

These intelligent bots can answer routine queries in any language and handle complexities. This helps free up agent time and equips your service teams to be active throughout the day.

Product features

Recommend new products and services and uncover new features based on usage data.

Onboarding assistant

Automate the onboarding journey with an assistant that takes the customer through the entire process.

Knowledge recommendations

Suggest relevant knowledge articles and how-to guides to the users based on their product usage.

Gamification

Automate or Gamify rewards and recognition for constant product adoption and following best practices.

Hyper-personalization

AI can analyze past customer interactions and predict their needs, making your customer service approach more proactive rather than reactive.

Role of Human Touch

- **Proactive outreach**
  Leverage products like Data Cloud, Service Cloud, Microsoft Fabric, or similar products to anticipate customer needs and proactively reach out to address product questions or concerns.

- **Strategic intervention**
  Continuously mine usage data to identify signals that require intervention by the customer success manager or others to provide a positive customer experience.

Customer Journey Checklist (Free Template)

This checklist will guide you through creating a valuable customer journey map. Remember, this is a flexible framework; adapt it to your needs and goals.

Stage	Touchpoints	Customer Experience	Check
Awareness	Social media ads Website content Search engine results	• Is the message clear and relevant? • Does it pique customer interest?	✓
Consideration	Product brochures Reviews and testimonials Sales calls	• Is information readily available? • Can customers easily compare options?	✓
Intent	Free trials Demos Pricing information	• Is the buying process smooth? • Do customers feel confident in their choice?	✓
Purchase	Personalized consultation	• Is the purchase process secure and user-friendly? • Are multiple payment methods offered? • Do you offer ways for customers to • test or explore your product/service? • Can they easily get answers to specific questions?	✓
Onboarding	Welcome emails Setup guides Customer support	• Does onboarding provide a clear and positive first experience? • Do customers receive the support they need?	✓
Loyalty	Loyalty programs Exclusive offers Personalized communication	• Do you incentivize repeat business? • Do you nurture relationships with existing customers?	✓

Riding the AI Wave with Caution

No matter how advanced our technologies become, humans will always need compassion, empathy, and relationships. We must integrate the human element into our customer experiences to build long-lasting customer relationships. This upholds the importance of technology. AI and automation are essential for an improved customer experience, but having the right balance is the secret sauce for long-term success.

In this whitepaper, we've unpacked the strategies to blend AI, automation, and the human touch in crafting exceptional customer journeys; it is time to translate insights into action. But where do you begin? PreludeSys is a Salesforce consulting partner that excels in bridging the gap between technological advancement and human touch for empathy and emotion. As a leading Salesforce service provider, we leverage automation to personalize the buyer's journey while ensuring the human element remains at the forefront. Our expert team designs tailored solutions that empower you to cultivate meaningful connections and drive long-term success.

We will help you use Salesforce's power to personalize experiences, automate vital touchpoints, and empower your human agents to deliver that magic touch.

DemandBlue, a subsidiary of PreludeSys, is a Salesforce Summit Partner whose certified Salesforce consultants deliver exceptional results; see our 4.9 AppExchange rating for proof.

To learn more about our specialized solutions for the Technology industry – Click here!

About the Author

Selva Pandian, **VP of Cloud Practice at PreludeSys,** is a Salesforce Identity and Access Management Architect and technology leader with over 25 years of experience building innovative, customer-centric solutions. He brings a deep understanding of Salesforce, data, AI, and analytics architecture to his work, coupled with a proven ability to deliver complex enterprise-level projects. Selva's insights on leveraging technology to enhance customer journeys, along with his emphasis on the importance of empathy in design thinking, make him a valuable voice in exploring the intersection of AI, automation, and the human touch.

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