Customer
Institute

The use of
AI in Experience Management
with Stefan Osthaus

The Right
Evaluations,
Priorities,
and Decisions
to Shape a
Successful Future

Customer
Institute
Certified Training Program

This course qualifies you to become a Certified Customer Centricity Expert (CCCX)

1. Target Group

The **AI for Customer Journey Management Seminar** with Stefan Osthaus is a high-impact training program designed specifically for customer experience professionals seeking to explore and leverage AI in their work. The event is ideal for:

- **CX Managers and Strategists** • aiming to incorporate AI into customer journey optimization but not knowing yet how to go about it

- **Customer Journey Specialists** • looking to enhance their ability to map and refine touchpoints using AI-driven insights.

- **Team Leaders and Decision-Makers** • responsible for initiating and managing the selection and implementation of AI tools.

This program provides a perfect starting point for CX professionals eager to integrate AI effectively into their customer journey management strategies. It provides participants with the right evaluation of potentials, an approach to assess risks, and the ability to prioritize the resulting opportunities of an AI implementation.

2. Concept & Certification

This one-day Customer Institute certified seminar is specifically tailored for customer experience professionals aiming to integrate AI into customer journey management. Led by an industry expert, this interactive, in-person program focuses on evaluating the potential of practical applications of AI to enhance customer journey optimization and personalization.

Participants will engage in hands-on exercises, group workshops, and interactive discussions, culminating in actionable strategies for their organizations. This seminar provides a strong foundation for leveraging AI in customer experience management and equips participants with the skills to effectively initiate AI-driven projects.
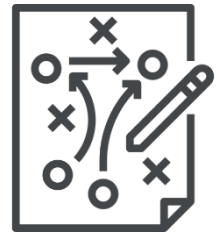
This course is certified by the Customer Institute and qualifies participants to become a Certified Customer Centricity Expert (CCCX) upon passing the final examination at the end of the course. Certification fees are included in the training fee.

3. Agenda

During the AI in Customer Experience training with Stefan Osthaus, we will cover all main aspects of AI use cases across the customer journey. The one-day agenda is filled with different learning, evaluation, and collaboration formats. The participants will enjoy a continiously high energy level and sustainable learning and insights throughout the day.

Coffee and lunch breaks happen throughout the day.

AGENDA

- **Welcome and Goal Setting**
    - o Introduction to the seminar objectives.
    - o Participant expectations and personal goals.

- **Understanding AI and Its Evolution**
    - o Key concepts: Automation, Machine Learning, General AI, and Narrow AI.
    - o Evolution of AI in industries (Industry 1.0 to 4.0).
    - o Discussion: "How AI is already impacting everyday life and CX."

- **The Role of AI in CX**
    - o Why empathy matters in CX.
    - o AI applications across the customer journey:
        - ▪ Predictive analytics for customer behavior.
        - ▪ Personalization and recommendations.
        - ▪ Sentiment analysis and customer feedback.
        - ▪ Automated customer support and chatbots.
        - ▪ Other applications by customer journey phase
    - o Case examples: AI implementations by leading companies (e.g., Netflix, Spotify, Zurich Insurance).

- **AI Use Cases and Technologies for CX**
    - o Content creation and personalization.
    - o Customer journey mapping.
    - o Natural Language Processing (NLP) for chatbots.
    - o Predictive analytics and visual recognition.
    - o Demo: Interactive session on an AI tool (e.g., AI-supported sentiment analysis).

Customer
Institute

- **Ethical Considerations in AI**
    - Key principles: Transparency, fairness, accountability, and data privacy.
    - Addressing common concerns:
        - Job displacement.
        - AI biases and discrimination.
        - Public perception and customer trust.
    - Group activity: Identify and discuss ethical risks in AI use cases.

- **Assessing Your Organization's Readiness**
    - SWOT analysis for AI readiness:
      Strengths, Weaknesses, Opportunities, and Threats.
    - Feasibility: Technology, data, organizational culture, and resources.
    - ROI and prioritization of AI projects.
    - Practical exercise: Participants assess AI feasibility in their organizations.

- **Designing Your AI Roadmap**
    - Step-by-step approach:
        - Identify AI'able activities.
        - Select pilot projects.
        - Develop an implementation plan (costs, resources, and timeline).
    - Workshop activity: Create a draft AI roadmap for a specific CX function.

- **Discussion and Q&A**
    - Address participant questions.
    - Share insights from group activities.

- **Conclusion and Next Steps**
    - Recap of key learnings.
    - Recommendations for integrating AI into CX strategies.
    - Resources for continued learning.
    - Summary and feedback

- **Exam (optional)**
    - A 30-minute written exam to assess the understanding and application of today's material.
    - This program is Customer Institute certified and can earn you CCCX certification upon passing the short exam. The certification fee is already included in your training fee.

Material: digital workbook, CCCX certificate (upon passing exam) – included in the participation fee

Customer
Institute

4. Seminar Elements

This engaging one-day seminar equips participants with practical tools, insights, and strategies to leverage AI in customer experience management through a blend of interactive and insightful learning formats.

- **Foundations and Use Cases** • delivered by a leading expert in AI and customer experience, providing a clear understanding of AI's potential and real-world applications.
- **Interactive Demos** • hands-on sessions exploring cutting-edge AI tools and technologies tailored for customer experience enhancement.
- **Ethical Insights** • guided discussions to address key considerations like transparency, data privacy, and fairness when implementing AI solutions.
- **Workshops and Group Activities** • collaborative exercises to identify opportunities, assess organizational readiness, and design actionable AI roadmaps.
- **Practical Takeaways** • participants leave with customized strategies and plans to kick-start AI initiatives in their own organizations, ensuring immediate applicability.

This seminar provides a comprehensive, dynamic, and highly practical approach to integrating AI into customer experience management.

5. Customer Institute Certified

The Customer Institute is an independent not for profit organization. Experts, practitioners, authors, and educators from the field of customer centricity make up the institute's board of directors as well as the much larger group of contributors to their research and tool development.

This training program is certified by the Customer Institute as meeting or exceeding industry best practices in management education. Participants will receive a participation certificate reflecting this Customer Institute certification. Upon passing the final examination at the end of the course, participants can optionally (at no additional cost) earn certification as Certified Customer Centricity Expert (CCCX).

The CCSX certification is valid for three years and turns into a lifetime certification if renewed once within these three years.

6. Your Facilitator

Stefan Osthaus is one of the industry's top thought leaders and consultants. He has been a leader in Fortune 500 companies for more than 15 years and has held global responsibility for the customer experience of 120 million customers as well as the employee experience of tens of thousands of employees.

Stefan now helps leading organizations around the globe to combine their Customer and Employee Experience practices and treat them as two sides of the same coin. Stefan is the president of the Customer Institute, a global keynote speaker, and an insightful author.

mer
tute

7. About the Customer Institute

We are the go-to destination for everyone looking to excel through customer centricity. We develop, promote, and certify best practices. We help let the Global CX Community thrive in their professional development, personal growth, and brand impact. Our Board of Directors is made up of leading global CX thought leaders.

OUR BOARD OF DIRECTORS

Alec Dalton	Elly Domene	Manuela Pifani	Nils Schmeling	Stefan Kolle
Amjad Khan	Gabriela Ciupitu	Michelle Ansell	Olga Guseva	Stefan Osthaus
Atasun Kaşbaş	Gitana Velickaite	Michelle Spaul	Dr. Omnia Negm	Susanne O'Gorman
Betül Yılmaz	Gokhan Kaya	Morris Pentel	Qaalfa Dibeehi	
Daudi Mugabi	Joan Ntabadde Kyeyune	Muss Haq	Ragna Ghoreishi	
Desirree Madison-Biggs	John Wong	Nathalie Schooling	Rekha Weerasooriya	
Diane Magers	Ledi Lapaj	Nilakantasrinivasan J	Rolu Adebola	

Customer
Institute