

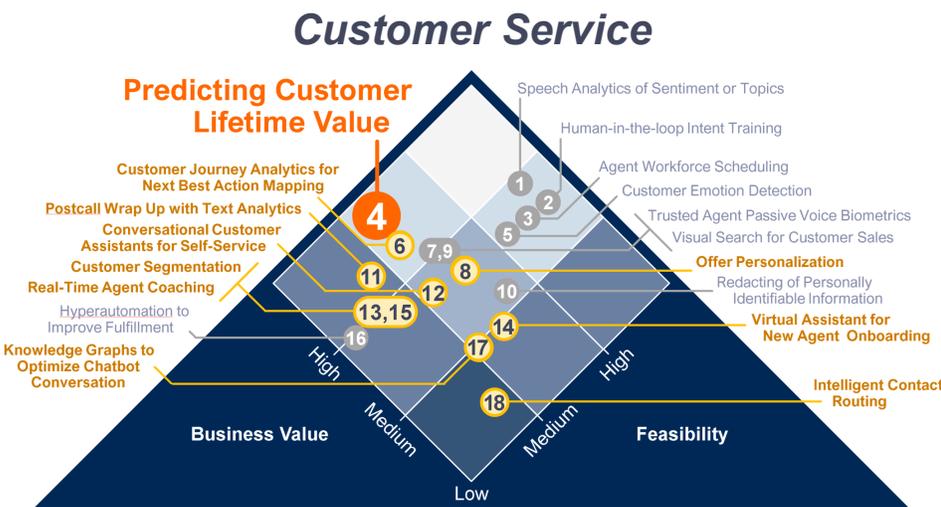
# Guiding AI-Powered Customer Engagement

The Critical, North Star Role of Customer Value Analytics in Customer Engagement AI

Artificial intelligence is poised to revolutionize the way in which companies engage with Customers, introducing unparalleled levels of intelligence, automation, and impact across a wide array of use cases. For Sales and Customer Service Use Cases, Gartner has identified Customer Lifetime Value (CLV) Analysis as having the greatest business value potential—a perspective we at OnePolaris firmly endorse.

Every customer engagement decision—whether made by individuals or AI algorithms—requires a guiding compass. More often than not, the ultimate measure of a decision’s success is its contribution to ROI, a metric that resonates universally, especially with CFOs.

## Gartner® AI Use Case Prisms



- CLV Use Case scored Highest Business Value
- Other Use Cases heavily influenced by CLV Intelligence

CLV takes center stage in this conversation by serving as the "R" in ROI, uniquely capable of linking any customer-facing action or investment to measurable financial outcomes. Companies that adopt this approach not only unlock higher performance and build invaluable assets but also create a self-reinforcing cycle of improvement. Over time, this compounding advantage becomes increasingly difficult for competitors to match, making early adoption a pragmatic yet transformational strategic and financial decision.

OnePolaris was purpose-built to help companies embrace this transformative approach. Our **Customer Value Engineering (CVE)** solution serves as a unifying, enterprise-wide North Star metric and decision-support system, seamlessly applying to all customer touchpoints—including CX, Marketing, Sales, Pricing, Promotions, Product & Service engagement, and more. Importantly, CVE doesn't add complexity—it simplifies by adding structure and unlocking the full potential of the systems and data you already have.

We would welcome the opportunity to share more about how Customer Value Engineering can drive meaningful results for your organization.

Source: Gartner, AI Use Case Prisms for B2B Sales and Customer Service  
 Note: highlighted Use Cases of Customer Lifetime Value and others that require Customer Value as a North Star for the purposes of this Document

# Gartner® Sales AI Use Case Prism

AI / ML Use Case <sup>1</sup>	Gartner Description <sup>1</sup>	Critical North Star Role of Customer Value <sup>2</sup>
<b>1. Price Optimization</b>	Uses AI to suggest optimal pricing for every deal	Pricing decisions made with the clear objective of driving enterprise-wide, full customer relationship value (vs. simply maximizing profit of a deal)
<b>2. Customer Lifetime Value Analysis</b>	Provides customer health scores for all kinds of activities (e.g., churn, upselling)	The concept of Customer Lifetime Value is transformed into a dynamic, enterprise-wide, financially-oriented compass
<b>3. Lead Scoring</b>	Uses ML models to predict conversion likelihood, to prioritize sales leads	Upside Customer Value potential and related conversion probabilities utilized to prioritize accounts and leads
<b>4. Cross-Selling and Upselling</b>	Uses ML to identify new business opportunities for existing customers	Customer value expansion pathway analysis utilized to identify next best offers to unlock value over the short and long term
<b>5. Demand Generation</b>	Identifies new prospect segments from known characteristics of known segments.	Identifies and prioritizes prospects and segments based on their known / calculated Customer Value potential, as well as prioritizes 'Next Best' demand gen investments by ROI
<b>6. Territory Optimization</b>	Produces a balanced set of territories, based on geographic, account and product data.	Customer Value potential / becomes a key input to territory optimization
<b>7. Sales Content Personalization</b>	Uses ML algorithms to recommend personalized content to sellers for nurturing customers.	Content recommendations prioritized based on quantified ability to support Customer Value growth for specific customer situation & segment
<b>8. Lead Discovery</b>	Uses AI to automate routine business conversations and provide better lead qualification.	The critical lens of Customer Value potential and evolution pathways into lead qualification. Applies to both prospects and existing customers
<b>9. Knowledge Management</b>	Uses ML models to surface relevant information to sellers for managing customer requests better and faster.	Surfaces insights and information contextualized by Customer Value priorities, ensuring sellers address high-value customer needs with precision
<b>10. Sales Forecasting</b>	Uses AI to predict sales forecasts based on historical data and seasonalities.	Forecasting integrates Customer Value projections, enabling organizations to prioritize high-value accounts and align forecasts with enterprise-level objectives
<b>11. Guided Conversations</b>	Uses NLP to uncover customer sentiments and helps in guiding customer conversations.	Guides conversations based on sentiment analysis and Customer Value insights, equipping sellers to address high-impact opportunities and foster stronger relationships
<b>12. Opportunity Scoring</b>	Uses AI to predict win probabilities by sales stage for prioritizing next steps.	Similar to lead scoring, upside Customer Value potential and related conversion probabilities utilized to prioritize accounts and leads
<b>13. Account Intelligence</b>	Uses AI to recommend curated content about the prospects/ clients based on current news feeds.	Account intel aligned with Customer Value drivers, both current and upside potential, helping sellers engage with insights that drive ROI and enterprise-wide value
<b>14. Relationship Intelligence</b>	Uses AI to identify and suggest relevant business contacts within the seller's social network.	Identifies relationships with the greatest potential to influence high-value customer outcomes

<sup>1</sup>Source: Gartner, AI Use Case Prism for B2B Sales

<sup>2</sup>OnePolaris point-of-view surrounding how a Customer Value lens provides critical intelligence for specific AI / ML Use Cases

# Gartner® Customer Service AI Use Case Prism

AI / ML Use Case <sup>1</sup>	Critical North Star Role of Customer Value <sup>2</sup>
1. Speech Analytics of Sentiment or Topics	Minimal / N.A.
2. Human-in-the-loop Intent Training	Minimal / N.A.
3. Agent Workforce Scheduling	Minimal / N.A.
<b>4. Predicting Customer Lifetime Value</b>	Transforms the concept of Customer Lifetime Value into a dynamic, enterprise-wide, financially-oriented compass
5. Customer Emotion Detection	Minimal / N.A.
<b>6. Customer Journey Analytics for Next Best Action Mapping</b>	Next Best Actions guided and prioritized by Customer Value insights and impact
7. Trusted Agent Passive Voice Biometrics	Minimal / N.A.
<b>8. Offer Personalization</b>	Next Best Actions / Offers guided, prioritized, and personalized based on customer value evolution analytics, conversion probabilities, value-based customer segmentation, etc.
9. Visual Search for Customer Sales	Minimal / N.A.
10. Redacting of Personally Identifiable Information	Minimal / N.A.
<b>11. Postcall Wrap-up with Text Analytics</b>	Postcall wrap-up takes into consideration customer value and related outcomes, next steps, etc.
<b>12. Conversational Customer Assistants for Self-Service</b>	Next Best Actions / Offers guided, prioritized, and personalized based on customer value evolution analytics, conversion probabilities, value-based customer segmentation, etc.
<b>13. Customer Segmentation</b>	A value lens embedded within Customer Segmentation fosters appropriate consideration, prioritization, investment, etc.
<b>14. Virtual Assistant for New Agent Onboarding</b>	Customer value-based point-of-view and input embedded within Virtual Assistant algorithms
<b>15. Real-time Agent Coaching</b>	Customer value-based coaching, next best actions, investments, etc. incorporated into coaching
16. Hyperautomation to Improve Fulfillment	Minimal / N.A.
<b>17. Knowledge Graphs to Optimize Chatbot Conversation</b>	Embeds customer value-based considerations into knowledge graphs
<b>18. Intelligent Contact Routing</b>	Provides customer value and associated Next Best Action intelligence into contact Routing algorithms.

<sup>1</sup>Source: Gartner, AI Use Case Prism for Customer Service

<sup>2</sup>OnePolaris point-of-view surrounding how a Customer Value lens provides critical intelligence for specific AI / ML Use Cases