The Intelligent Transformation Toolkit

Your Guide to Tech-Powered iX

concentrix

Why iX Matters

When it comes to customer expectations, “good enough” interactions no longer cut it. Customers expect businesses to deliver seamless, personalized, and meaningful engagements across all touchpoints—whether physical, digital, or AI-driven. We’re talking about a shift from CX (customer experience) to iX (intelligent experience).

So, what is iX? At its simplest, it refers to the way technology leverages data and AI to provide personalized, seamless, and efficient interactions for users. It’s about moving beyond basic customer interactions to encompassing the entire experience, blending every stakeholder’s journey into something cohesive and valuable.

iX elevates the customer experience and everything connected to it. The employee experience becomes more efficient and empowering, enterprise systems become interconnected and smarter, and digital interactions feel fluid and intuitive. It transforms your entire organizational ecosystem into a well-oiled machine, working together for optimal results.

Practically speaking, the real power of iX lies not in automating everything for the sake of convenience, but in thoughtfully combining AI with human insights to amplify outcomes at every level. Enter iX Hello™, our flexible, enterprise-grade AI assistant that empowers employees—giving them AI-enabled productivity boosts—while simultaneously improving customer-facing experiences.

To skeptics, the pushback against AI-powered intelligent experiences often comes down to two key arguments:

“AI lacks the emotional nuance of humans.”

Absolutely. AI tools like iX Hello aren’t replacing human nuance—they’re empowering employees to spend more time focusing on complex, high-value tasks while the AI assistants handle routine and repetitive actions.

“Can an AI truly ensure security and compliance?”

Unlike many generic AI offerings, solutions in the iX suite prioritize enterprise-grade security and trust by design. Instead of public data, the AI is trained using private, secure, enterprise-specific information, which eliminates compliance concerns.

These critical arguments underscore why we advocate for iX over just AI. It’s not about using tech for tech’s sake, but strategically positioning AI as a tool to empower—not overwhelm—your business and its people.

Samuel Eniojukan
Vice President, Artificial Intelligence

Welcome to the Future of Intelligent Transformation

Over the past twenty years, companies eager to stand out in a crowded market have looked at basic CX as their path to sustainable growth. However, today's customers are expecting more. This pushes us to rethink how we blend the multitude of experiences that define success.

Today's companies need to expand their vision to adopt an approach of iX, embracing advanced technologies such as AI and machine learning (ML) to enhance user interactions in a meaningful and personalized way. It's about moving beyond basic customer interactions to encompassing the entire experience—customers, employees, suppliers, and the brand itself.

This e-book serves as a guide for executives seeking to bridge their company's present approach with an innovative and profitable future.

We'll show you:

- What iX could mean for your people, customers, and business.
- The transformative potential within the trends behind iX.
- How adopting an iX strategy can turn the tide of disruption into a competitive advantage.
- Step-by-step guidance on incorporating an iX framework into your organizational fabric.

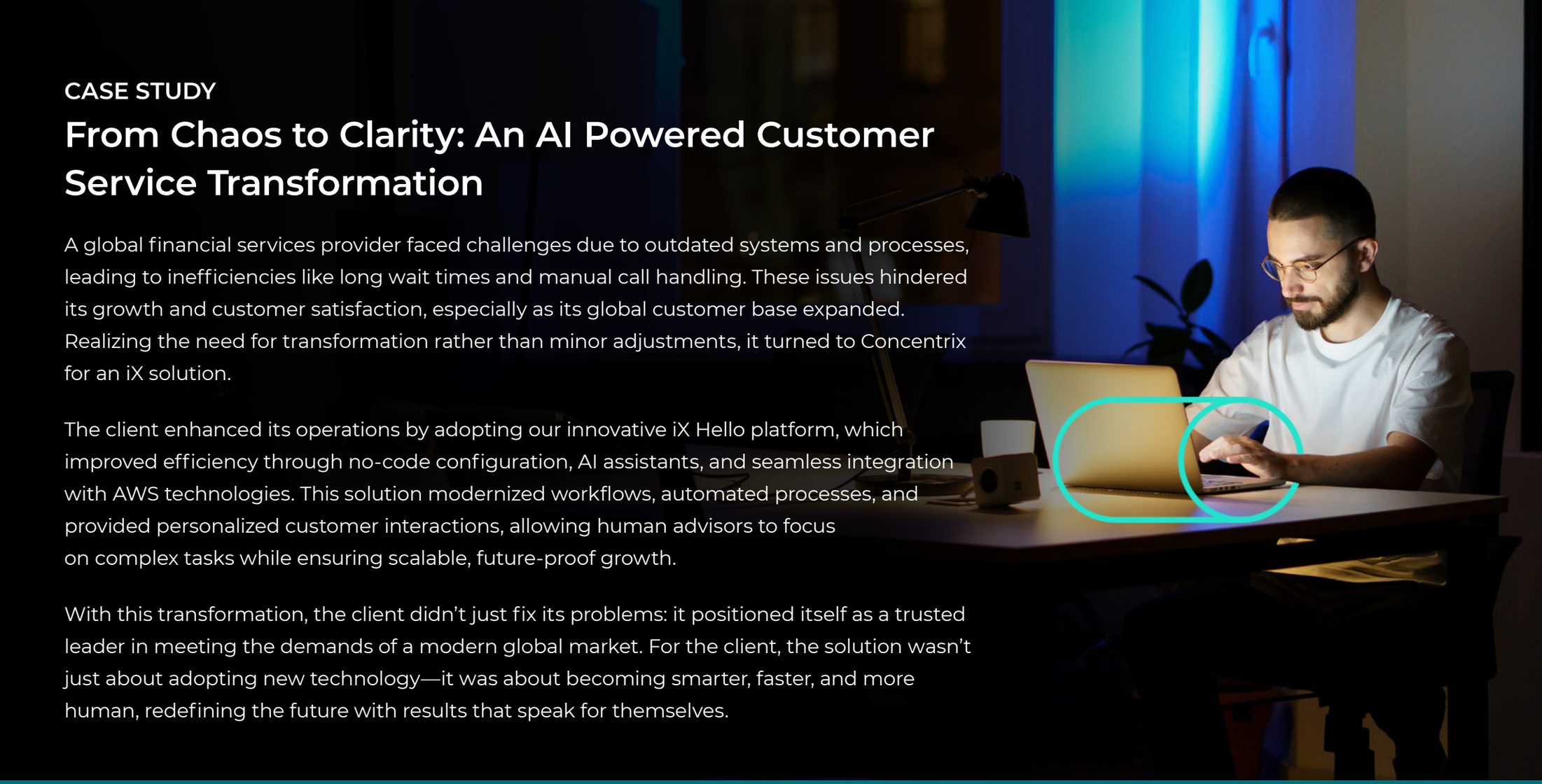
The concept of iX and its associated technologies doesn't stop at the boundaries of people's roles or even your enterprise. To get a handle on their power, you'll need to take on a different approach.

By embedding iX into the core of your business strategy, you're equipping your teams to address and solve complex challenges across your organization, paving the way for a future where every touchpoint is an opportunity for innovation and growth.

Don't just adapt to change—get ahead of it and start thriving with intelligent transformation.

CASE STUDY

From Chaos to Clarity: An AI Powered Customer Service Transformation



A global financial services provider faced challenges due to outdated systems and processes, leading to inefficiencies like long wait times and manual call handling. These issues hindered its growth and customer satisfaction, especially as its global customer base expanded. Realizing the need for transformation rather than minor adjustments, it turned to Concentrix for an iX solution.

The client enhanced its operations by adopting our innovative iX Hello platform, which improved efficiency through no-code configuration, AI assistants, and seamless integration with AWS technologies. This solution modernized workflows, automated processes, and provided personalized customer interactions, allowing human advisors to focus on complex tasks while ensuring scalable, future-proof growth.

With this transformation, the client didn't just fix its problems: it positioned itself as a trusted leader in meeting the demands of a modern global market. For the client, the solution wasn't just about adopting new technology—it was about becoming smarter, faster, and more human, redefining the future with results that speak for themselves.

Low friction adoption: Users could jump right in, embracing user-friendly interfaces without the need for extensive training.

Information accuracy: Directly integrated with existing data sources, erasing common input errors such as misunderstandings or misspellings.

Omnichannel solution: iX Hello delivered a consistent experience, with every customer interaction feeling streamlined, connected, and on-brand.

What Is Intelligent Transformation?

Intelligent transformation stitches together disparate experiences into a unified whole. To make all experiences more valuable, more agile, and more efficient, companies need to treat them as interrelated—and, let's face it, they are. It's about building stronger, better relationships between the moving parts: brand and customer; organization and employee; and the enterprise and digital systems.

On their own, each of these experiences has a complex and rich history with dedicated strategies and solutions, but solving individual business challenges in the isolation of a single framework ignores the interrelated nature of experience.

Customer Experience (CX)

Creates seamless and personalized interactions at every touchpoint between brand and customer. This encompasses the entire journey from initial consideration through to the purchasing process and post-purchase support.

Employee Experience (EX)

Covers the employee lifecycle from initial application to offboarding. Valuing EX shows an organization's commitment to operational excellence and a fulfilling work environment, especially as the introduction of AI shifts employees to more high-value tasks.

Enterprise Experience (EE)

Incorporates interactions within organizations—among employees, departments, and systems—along with the tools and technologies for internal operations. An AI-powered EE fosters a positive and productive work environment by streamlining work processes and data management.

Digital Experience (DX)

Includes every digital interaction across websites, mobile apps, social media, and other digital touchpoints. DX focuses on usability, accessibility, and personalization to provide engaging, seamless experiences for customers and employees.

AI Experience (AIX)

Influences how users perceive, engage with, and derive value from AI systems in their daily lives or business processes. AIX includes user interactions through various interfaces, perceptions of efficiency and reliability in AI outcomes, and overall satisfaction with AI-assisted solutions.

Why It's Time for Intelligent Transformation

The rise of digital technologies like AI and ML has significantly changed the way businesses operate and engage with customers and employees.

While many companies remain trapped in silos of dedicated teams, departments, offices, and geographies, customers are demanding seamless, personalized experiences that are connected across all touchpoints, whether through a website, mobile app, social media, or in-person interactions. They also want that service faster and on their schedule with greater control over self-service options.

The catch? As eager as they are to reap the benefits of automation, decision-makers also care about what happens to their organizations' data and how AI may impact them.

This shift in customer behavior has led to the emergence of iX, which aims to understand and anticipate user needs, preferences, and behaviors to deliver contextually relevant content or services. iX systems can continuously learn from user interactions, adapt to changing conditions, and improve over time, and do so within an extensive, yet highly secure repository that connects those touchpoints while protecting customer data.

While iX is here to help drive revenue growth, it goes far beyond the customer experience, which only looks at interactions between a customer and a company, and is often focused on driving revenue growth. Instead, it encompasses every aspect of an organization—from sales and service to human resources, legal, finance, and information technology—to create a profitable and integrated experience for all stakeholders.

The following five emerging trends represent the driving forces behind this change.

1 The Economic Landscape Remains in Flux

A series of macroeconomic and social disruptions marked the 2020s with political shifts at home and abroad, tightened labor markets, heightened interest rates, rising inflation, and fluctuations in household spending making for challenging—and sometimes unprecedented—business decisions.

2 Productivity Has Never Been More Crucial

All this uncertainty means that it's never been more important to get the most from your people—which increasingly means using AI to accelerate productivity. With potentially more than 60% of jobs in advanced economies exposed to AI-related job transformation,[1] we're at a turning point for the human element of iX in the coming years.

3 Demand for Digital Experiences Continues to Grow

The pandemic may seem like the distant past, but we're still feeling its ripple effects in terms of accelerating digital adoption, especially in terms of remote work, remote support, and an increasingly wireless, contactless, cashless society. A staggering 81% of businesses view this digital customer experience as extremely or very important, acknowledging its pivotal role in driving business success.[2]

4 The Rise of Generative AI Will Transform the Enterprise

Companies are scrambling to find ways to leverage advanced technologies, including generative AI. In an MIT Sloan survey, 80% of respondents said they believe generative AI "will transform their organizations."[3] That's because the prize it promises could be truly game-changing: those very same seamless, personalized experiences that customers are seeking across touchpoints, with automated interactions at scale and enterprise-wide.

5 The AI Model Is Maturing

The more companies innovate and outperform their competitors, the faster AI's maturity model advances. This leads to a more sophisticated architecture, improved training methodologies, and enhanced frameworks that counter data biases and provide greater transparency in AI-based decisions.

Could iX, fueled by generative AI, truly mark a paradigm shift? Definitely. But companies must monetize it smartly for its full promise to turn into a reality.

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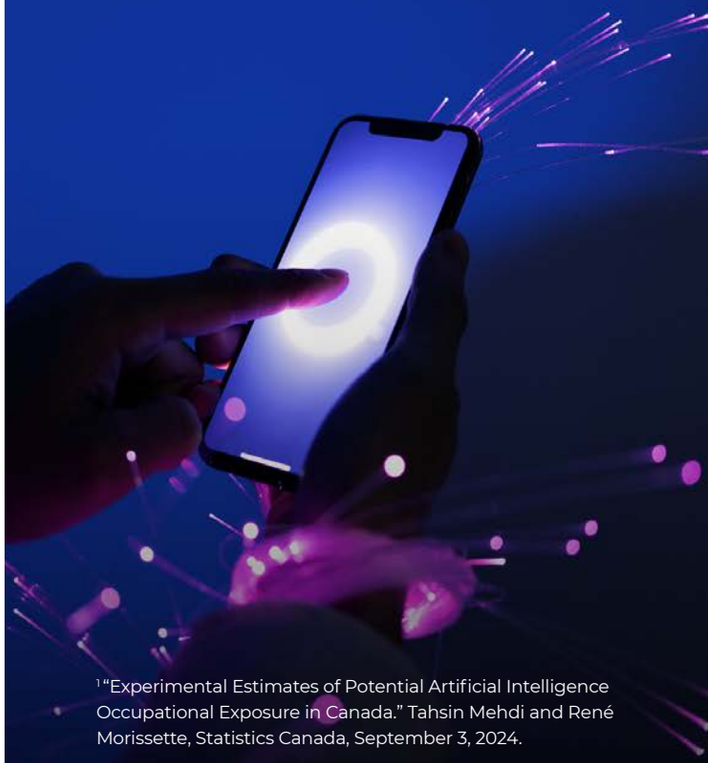
of businesses view the digital customer experience as extremely or very important



[1] "Experimental Estimates of Potential Artificial Intelligence Occupational Exposure in Canada." Tahsin Mehdi and René Morissette, Statistics Canada, September 3, 2024.

[2] "5 Findings From the 2024 'State of Digital Customer Experience' Report," Dom Nicastro, CMSWire, January 23, 2024.

[3] "Five Key Trends in AI and Data Science for 2024," Thomas H. Davenport and Randy Bean, MIT Sloan Review, January 9, 2024.

Unlocking Intelligent Transformation

When looking at a customer journey, CX practitioners often focus on the touchpoints that help companies see engagement the way customers do. Assuming it ever was the full picture, that's no longer the case.

Whether it's the underlying corporate culture, the digital ecosystem at the customer's fingertips, or the back-office integrations that power the tech infrastructure, a single touchpoint is much bigger than what we see at face value.

iX requires organizations to think differently, especially as technology rapidly transforms industries. The challenges facing businesses are evolving faster than most businesses can keep up with.

Here are just a few:

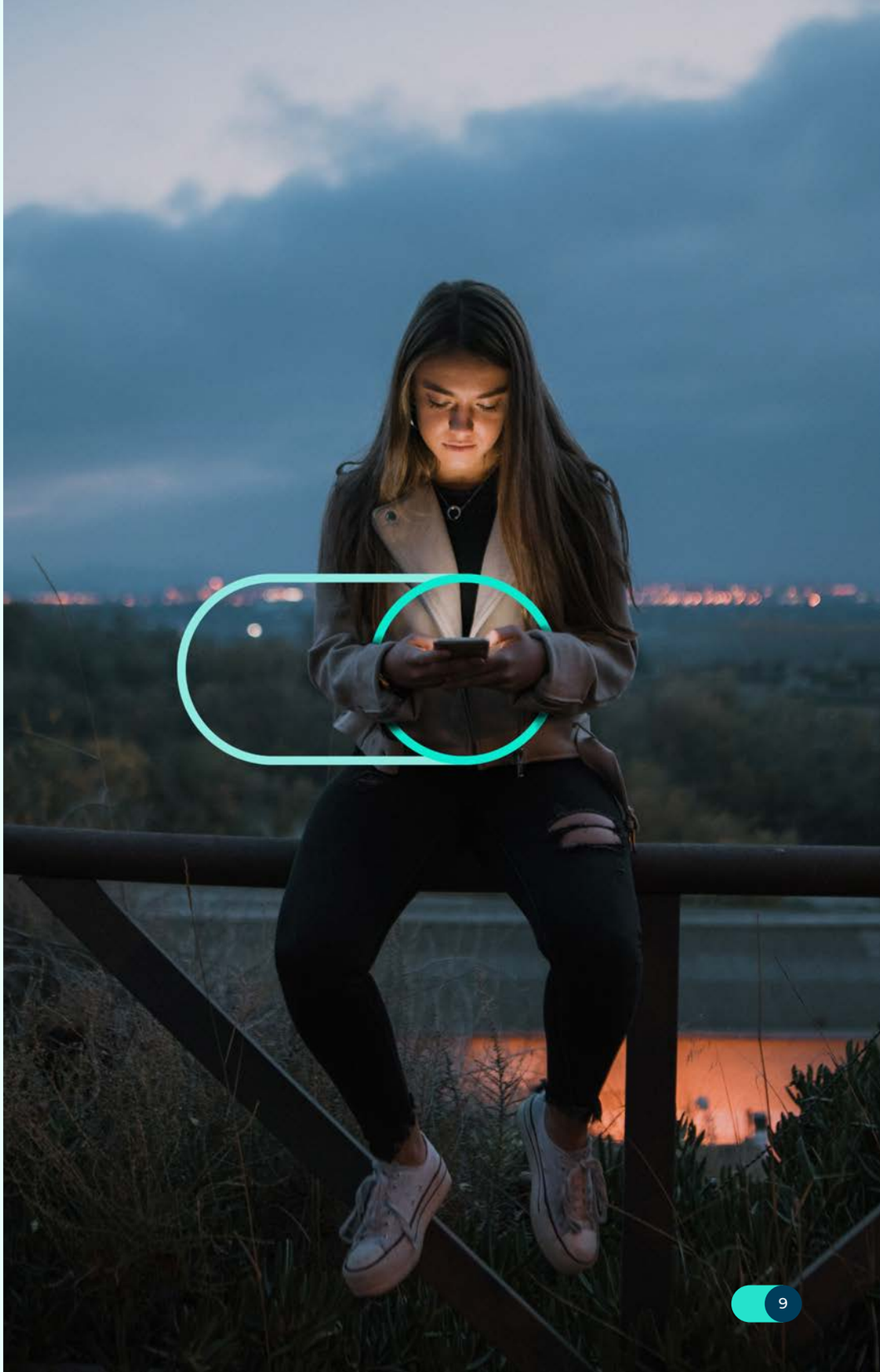
1 Innovating in the Market

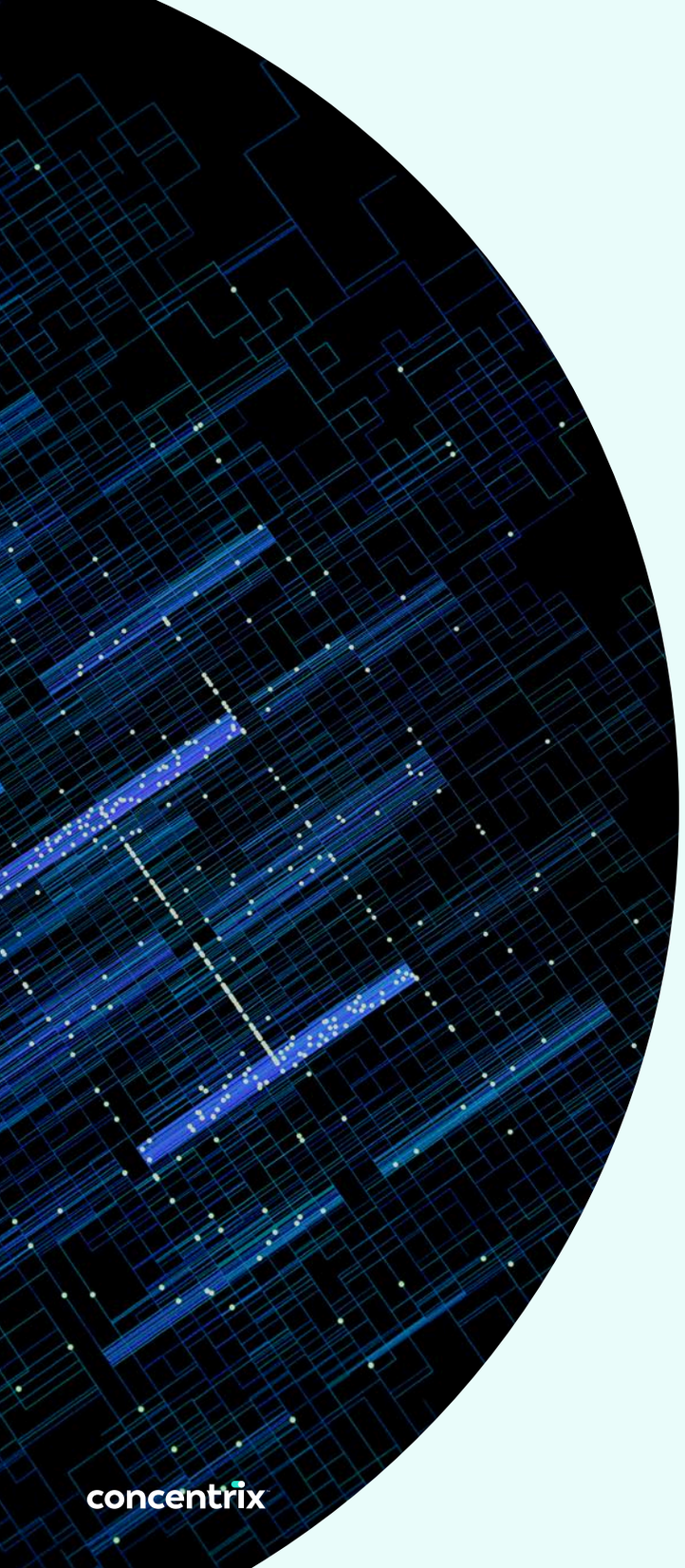
Top-tier digital experiences that empower customers don't come easy. You'll not only need to have a firm grasp of customer expectations, but also access to customer-facing digital solutions along with internal processes, tools, and customer data to make this happen. The importance of organizational agility and the capacity for rapid innovation become foundational elements.

"One key aspect of intelligent transformation is considering both consumer technology and the technology within organizations they interact with.

The power of technology in consumers' hands, like smartphones with embedded AI, shapes their expectations. Often, client technology may not be as advanced or agile as consumer technology. It's crucial to ensure these technologies communicate effectively. Consumers expect simple, easy-to-use interfaces on their mobile devices, but sometimes face friction in interactions with brands. And so, consumer technology expectations are driving how they want to interact with organizations."

Doug Anderson
Head of Digital Experiences





2 Harnessing Data across the Enterprise

Organizations now need the ability to leverage vast datasets to craft interactions that aren't only frictionless, but also deeply meaningful to customers across their entire lifecycle with a brand. This transition towards creating supreme value in every interaction—and safeguarding the customer data driving it—underscores the shift from traditional approaches to a unified iX.

In this light, iX transcends being just a strategy—it becomes a commitment to enriching the lives of all stakeholders with thoughtful, data-driven solutions while thoroughly upholding their trust and privacy.

"We're working with a brand who's done a lot of research around what good outcomes look like in healthcare.

What they found was individuals prefer to share more with a chatbot than they would with a human, and then that technology could potentially connect them with resources. For example, having to have access to a digital health coach who you're connecting with on a frequent basis who knows where you are in your biometrics, as well as socially, and can connect you to the right resources locally and arrange for transportation. This kind of hyper-personalized intelligent experience is oriented around making sure that individuals are getting what they need, how they need it, and when they need it. It is super exciting."

Jen Winter
Executive Vice President, Strategy and Design

3 Becoming AI-Enabled

In a world where AI seems to be everywhere, the key for brands lies not just in what technology they use, but how they use it to address the needs of their stakeholders. Embracing AI to create more personalized and meaningful interactions signifies a move towards an iX that addresses people's complex needs.

Becoming AI-enabled means designing and embracing AI agents to autonomously perform specific tasks on behalf of a user or even another program. These agents can range from simple rule-based systems to sophisticated models that employ machine learning and natural language processing to learn, process, adapt, and respond to both the data consumed and the context of the task.

For businesses, AI agents can dramatically enhance efficiency and decision-making capabilities, freeing humans to focus on strategic initiatives requiring the kinds of insight that AI can't (yet) replicate. Becoming AI-empowered gives businesses the capacity to process and analyze data swiftly, stay competitive, improve customer satisfaction, and drive revenue growth through enhanced operational efficiencies driven by strategic foresight.

"In time, you can expect to see AI agents, including chatbots, everywhere.

As technology advances, these agents will evolve from simple, slow, text-based interactions to sophisticated, AI-powered conversations that understand context and provide real-time solutions. Despite these advancements, it's important to remember that these AI tools are not truly conscious or intelligent in the way humans are; they are highly effective at mimicking humans. As we integrate these digital personas into our daily lives and businesses, developing a comprehensive strategy to enhance customer and employee experiences—the intelligent transformation—will be crucial."

Guillermo Zuniga
Senior Director, AI Solutions

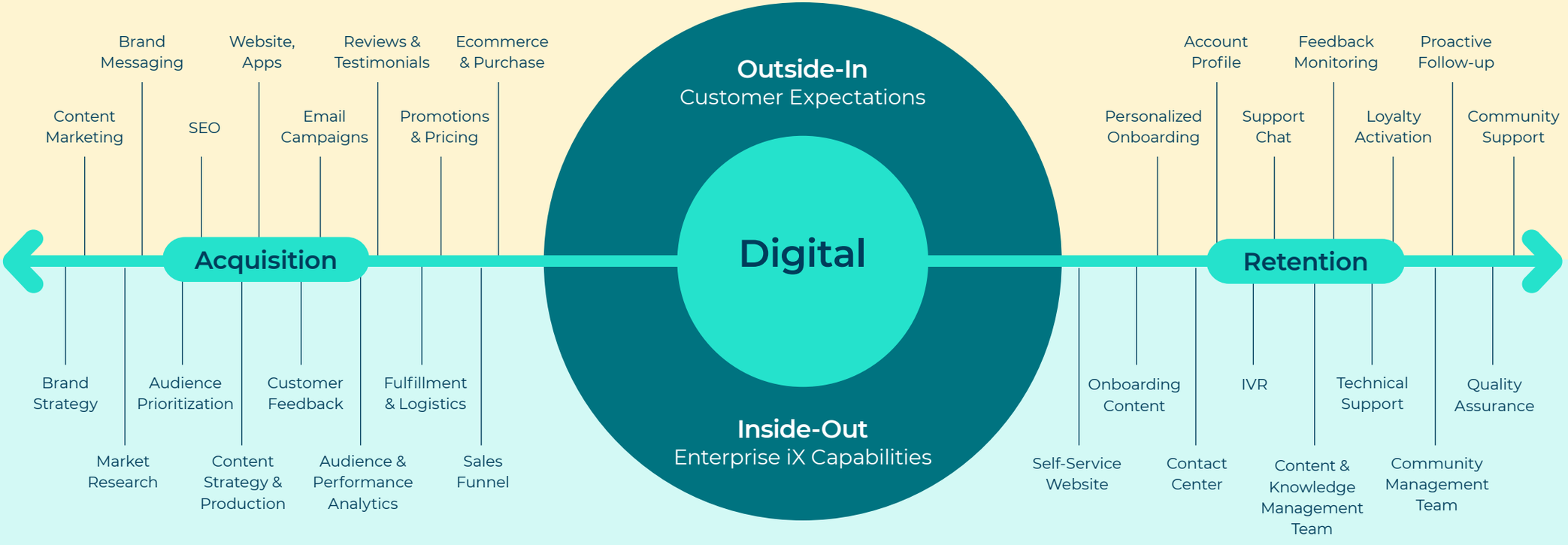
4 Augmenting People with Technology

The interplay of technology and people is what will ultimately make iX truly impactful for customers, employees, and other stakeholders. Through the smart use of AI and machine learning, companies have a once-in-a-generation opportunity to craft an iX that keeps pace with expectations across your workforce and customer base(s).

"What's interesting about this era of technology that we're headed into is it's a new way to talk about how brands are going to be more helpful in the future.

Whether it's provided by AI or whether it's provided by a human. Or some mix of the two. And being helpful is a human truth. As long as humans have been around, we've been trying to figure out how to better help each other. How do you get help? How do you ask for help? And it's my strong belief that brands that are more helpful in the future will win."

James Kim
Head of Strategy & Design



Start Thinking Outside-In (and Inside-Out)

We've spent the last decade being told by experts that CX needs to be about more than just an outside-in approach, and the same is even more true with it comes to iX. As we look to the next decade of technological evolution—and revolution—companies who fail to expand their horizons to inside-out thinking will fail at iX.

- An **outside-in approach** starts with what customers need and how they behave, then expands outward into designing products and services by putting yourself in customers' shoes.
- An **inside-out approach** starts with employees, the systems they use, the core processes that support customers, and everything that connects an organization as the foundation of success.

By looking at experiences from both perspectives, you can pinpoint the overlaps, the connections, and the dependencies between stakeholders, ensuring your business thrives at all levels. When you consider both perspectives as part of iX, the success of one will benefit the others, keeping your customers, your employees, and your company connected throughout the buyer's journey.

CASE STUDY

AI On Time: How iX Hello Enhances Efficiency and Accuracy

When a global logistics leader expanded its customer service operations in support of domestic and international customer inquiries regarding product postings—as well as complex questions about terms, conditions, and policies—it required advisors to rely on a 180+ page guide. As you might expect, the onboarding of newly hired staff was time-consuming. Accuracy suffered and call times kept rising.

To enhance service efficiency, we approached the client about implementing iX Hello to replace the massive static guide (as well as other outdated systems). We designed and delivered a robust front-end solution to streamline customer service workflows without requiring database integration.

With iX Hello, advisors had access to an intuitive interface for quick, efficient information that not only digested the client's manual, but understood it and made it accessible. For the client, it was a giant first step towards iX that was easily adaptable for seamless global operations—one that met its database compliance concerns and adhered to all integration restrictions.

Improved accuracy
with increased response accuracy and error reduction.

Decreased call times
with quicker access to answers in the service guide.

Accelerated onboarding
empowering new hires to achieve proficiency faster.

Orchestrating Your Own Intelligent Transformation

Given the current stakes, you may be ready to bolster your organization with iX. Here's a step-by-step overview on how you can do it.

At a high level, we'll guide you from the start to continuous improvement, beginning with design creation and data structuring, then moving through the hands-on implementation phase and continuing with ongoing innovation to stay aligned with evolving market trends.

Remember, it's not about being the first to launch something new. It's about launching something that works, stays relevant, and is smart enough to keep evolving.

DESIGN.

Define an intelligent experience in your organization

Clearly articulate what iX means for your organization. It should encompass every interaction your customers (and employees) have with your brand, product, or service across all touchpoints, both digital and physical. It should be something that leverages AI to intuitively support the capabilities of employees while improving customer engagements.

Identify iX stakeholders and gather feedback

Identify stakeholders and gather feedback for iX by mapping your organizational structure. Understanding the roles and interests of both those directly affected by the transformation and those whose support is crucial to its success. We recommend using surveys, interviews, focus groups, workshops, and data analysis to collect qualitative and quantitative insights into customer and employee pain points, expectations, preferences, and behaviors.

Map end-to-end iX journeys and analyze touchpoints

Identify and document all existing processes and customer interactions across the organization, including key touchpoints where AI technologies are integrated to enhance efficiency or customer satisfaction. Analyze these touchpoints to assess current performance, identify pain points, and clearly define your desired future state.

DESIGN.
BUILD.
RUN.

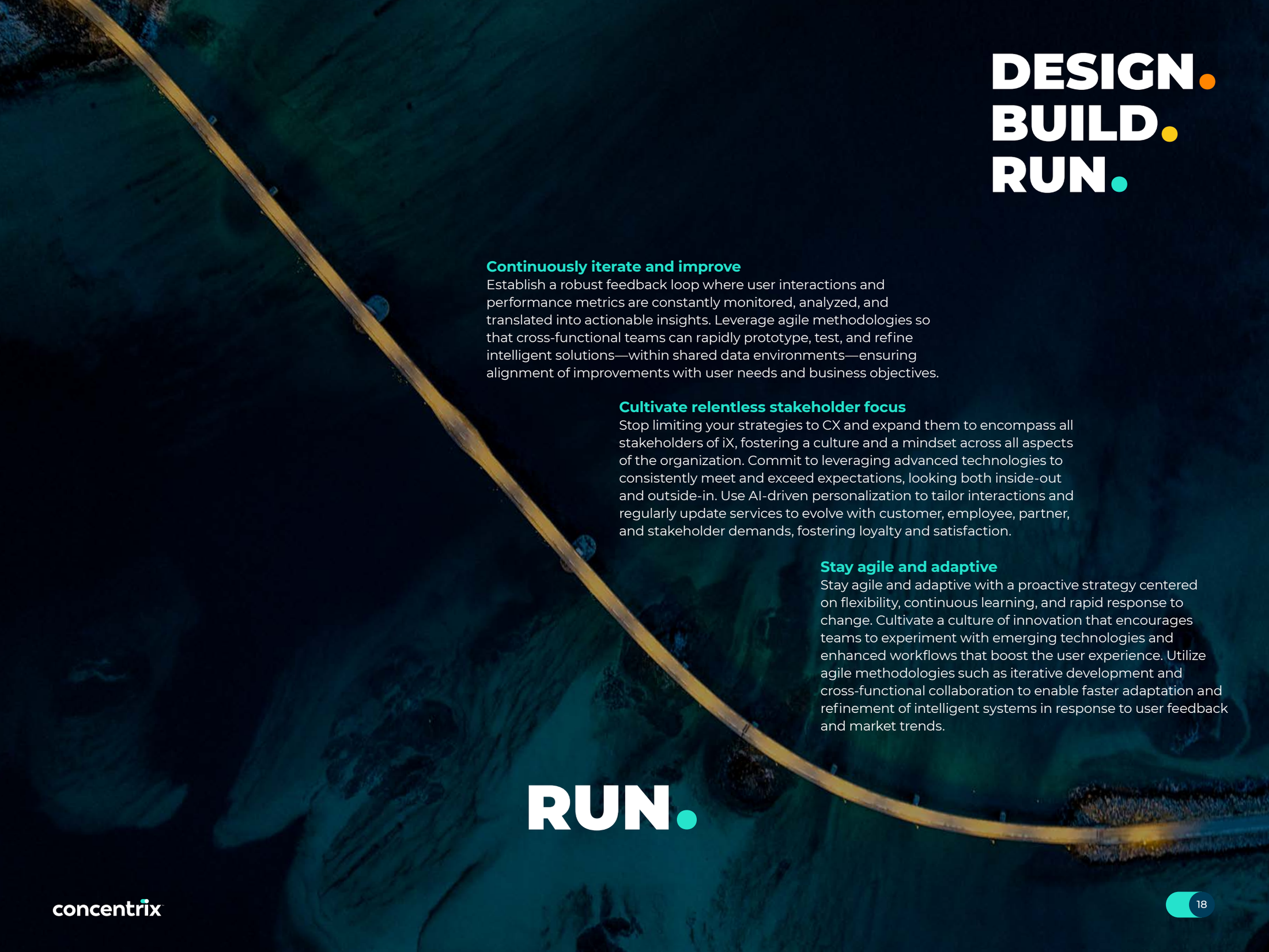
BUILD.

Break down siloed data sources
Integrate data systems into a unified platform that provides comprehensive access to information across the organization in a centralized location that allows for seamless sharing and analysis. Encourage cross-departmental collaboration and open communication to foster a culture that prioritizes data sharing, aligning everyone towards common goals behind iX.

Leverage technology to build seamless experiences
Integrate cutting-edge tools such as artificial intelligence, machine learning, and automation into customer and employee interactions to streamline and enhance each touchpoint. Deploy cloud-based solutions and Internet of Things (IoT) technologies to ensure real-time data access and connectivity across devices and embrace user-friendly design principles to ensure your technological solutions are intuitive for users and compatible with your broader technology stack.

Empower and energize your employees
Foster a workplace environment where AI and technology function as enablers for productivity and creativity rather than replacements. Automate mundane tasks and allow employees to focus on more strategic, value-adding activities, and invest in training programs that ensure employees are comfortable with new technologies, promoting confidence and engagement.

Define and monitor performance metrics
Define key performance indicators (KPIs) that align with organizational goals and user expectations, focusing on areas such as user engagement, efficiency, satisfaction, and innovation. These metrics might include user adoption rates, task completion times, error reduction, and user satisfaction scores, providing a comprehensive view of how effectively intelligent systems are enhancing experiences.



DESIGN. BUILD. RUN.

Continuously iterate and improve

Establish a robust feedback loop where user interactions and performance metrics are constantly monitored, analyzed, and translated into actionable insights. Leverage agile methodologies so that cross-functional teams can rapidly prototype, test, and refine intelligent solutions—within shared data environments—ensuring alignment of improvements with user needs and business objectives.

Cultivate relentless stakeholder focus

Stop limiting your strategies to CX and expand them to encompass all stakeholders of iX, fostering a culture and a mindset across all aspects of the organization. Commit to leveraging advanced technologies to consistently meet and exceed expectations, looking both inside-out and outside-in. Use AI-driven personalization to tailor interactions and regularly update services to evolve with customer, employee, partner, and stakeholder demands, fostering loyalty and satisfaction.

Stay agile and adaptive

Stay agile and adaptive with a proactive strategy centered on flexibility, continuous learning, and rapid response to change. Cultivate a culture of innovation that encourages teams to experiment with emerging technologies and enhanced workflows that boost the user experience. Utilize agile methodologies such as iterative development and cross-functional collaboration to enable faster adaptation and refinement of intelligent systems in response to user feedback and market trends.

RUN.

Conclusion

Tech innovation is set to define our future.

To unlock its full potential, however, businesses must move beyond tech for tech's sake. Technology must add value beyond the stack—it must power human connections. By focusing on this, we can make both customer and employee experiences better, leading to smoother, more personal, better connected iX interactions.

As AI shapes a new era of journeys and experiences, businesses will need to stay nimble, innovate, and commit to making people's lives better with tech. The journey towards iX—one that weaves together the one that weaves together the customer, enterprise, employee, digital, and AI experiences—requires a different approach. It's up to leaders to craft experiences that stick with people, inspire them, and make a lasting mark in our increasingly digital lives.

For companies looking to expedite their intelligent transformation, our iX suite of NLP and AI-powered technologies, beginning with iX Hello, provides enterprise-grade tools to get more done, make processes better, and use data efficiently. In just a few days, you can be up and running, customizing iX products to suit your business needs, enhancing the customer experience, and streamlining operations.

Interested in working towards intelligent transformation?

Let's Connect

About Concentrix

Concentrix is a global technology and services leader that powers the world's best brands, today and into the future. We design, build, and run fully integrated, end-to-end solutions to support your entire enterprise, at speed and scale.

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